Onboarding Template

Employee: _____   **Job Title**: _____

Reports to: (name, title, summary of responsibilities) _____

Peers/Teammates: (names, titles, responsibilities) _____

Management: Top executives, managers, etc. _____

Interdepartmental Contacts: (Names, titles and overview of role/relationship) _____

Direct Reports: (Names, titles, brief bios) _____

Key Contacts: (Clients, vendors, contractors this role interacts with regularly) _____

Administrative Information:

- Computer, user ids, badges, log-ins, timesheets, expense reports
- Technology used
- Time Management: Staff/Client meetings, deadlines, time reporting

Company Information:

Org Chart

Mission Statement, history, major projects, etc.

Mailing lists, groups to join, meetings to attend

Resources:

Any database/repository of job specific information

Where to go for information

Who to ask for help

To-Do List:

Outline reports, deadlines and work products expected and when they are due

Manage:

Ensure new hire has daily meetings with direct manager.

Follow-up:

Within first 4-6 weeks, set goals and expectations for the employee

Feedback:

Set up formal and informal meetings with new hire to gauge acclimation, have open discussions of job expectations and set up meetings with staff or customers that will expand job duties as needed.