

FIRM LOGO

NEW EMPLOYEE ONBOARDING PLAN

EMPLOYEE NAME:

START DATE:

ROLE:

SUPERVISOR:

TIME ZONE:

Section 1: Schedule

This section should be used to give the new team member guidance on scheduled events they are expected to attend during their first weeks of employment. The meetings outlined in this section should be scheduled on the new team member's calendar before their first day. The meeting appointment should include the meeting location or information to join virtually, as well as any other applicable information.

WEEK ONE

TUESDAY, MONTH DAY

TIME	EVENT	WITH	NOTES
8:30-9:00	Technology check	Team Member 1	
9:00-10:00	Welcome and Onboarding Plan Review	Supervisor	Review Onboarding plan
12:30-1:30	Introductions and Technology Overview	HR/Onboarding Team	
3:30-4:30	HR Policy Discussion	HR/Onboarding Team	
When not otherwise scheduled	Onboarding Tasks - Follow Training Agenda	Self-paced	When not scheduled for meetings or training, work to complete onboarding tasks by the end of the first week.

WEDNESDAY, MONTH DAY

TIME	EVENT	WITH	NOTES
8:30-10:00	Training with Team Member 2	Team Member 2	See topics listed below.
10:30-12:00	Training with Team Member 1	Team Member 1	See topics listed below.
1:00-2:00	Attend Client Meeting	Various	
When not otherwise scheduled	Onboarding Tasks - Follow Training Agenda	Self-paced	When not scheduled for meetings or training, work to complete onboarding tasks by the end of the first week.

THURSDAY, MONTH DAY

TIME	EVENT	WITH	NOTES
8:30-9:30	Training with Supervisor	Supervisor	See topics listed below.
10:00-11:30	Training with Team Member 3	Team Member 3	See topics listed below.
2:30-4:30	Attend Team Meeting	Various	
When not otherwise scheduled	Onboarding Tasks - Follow Training Agenda	Self-paced	When not scheduled for meetings or training, work to complete onboarding tasks by the end of the first week.

FRIDAY, MONTH DAY

TIME	EVENT	WITH	NOTES
8:30-10:00	Training with Team Member 1	Team Member 1	See topics listed below.
10:30-12:00	Training with Team Member 2	Team Member 2	See topics listed below.
Remainder of the day	Finish onboarding tasks.	Self-paced	

WEEK TWO**MONDAY, MONTH DAY**

TIME	EVENT	WITH	NOTES

TUESDAY, MONTH DAY

TIME	EVENT	WITH	NOTES

WEDNESDAY, MONTH DAY

TIME	EVENT	WITH	NOTES

THURSDAY, MONTH DAY

TIME	EVENT	WITH	NOTES

FRIDAY, MONTH DAY

TIME	EVENT	WITH	NOTES

ADDITIONAL SCHEDULED APPOINTMENTS / MEETINGS**Section 2: Long-Term Schedule**

This section should be used to give the new team member guidance on scheduled events they are expected to attend after their initial onboarding is complete. The meetings outlined in this section may or may not be scheduled ahead of the new team member's first day. If a meeting is not scheduled prior to the new team member's first day, consider adding a comment in the *NOTES* section indicating additional details to come.

DATE	EVENT	WITH	NOTES
May 2 nd	Attend Firm-Wide Meeting	Various	More details to come
June 1 st – 4 th	Attend Industry Conference	Team Member 1	

PERFORMANCE EXPECTATIONS**Section 3: Performance Expectations**

This section should be used to list information about the roles and responsibilities the new team member will have. Oftentimes, this information can be pulled directly from the job description.

BENCHMARKS

Section 4: Benchmarks

This section should be used to list performance expectations that should be met over the course of the new team member's first year of employment. Common milestone check-ins are 30 days, 60 days, 90 days, 6 months, and 1 year or 45 days, 90 days, 6 months, and 1 year. That said, these milestones should be set based on what makes the most sense based on the level of your new team member and the department they will be supporting. This section may also include the on-the-job training milestones your new team member will experience.

WITHIN YOUR FIRST 45 DAYS

EXAMPLES:

- Review performance expectations.
- Partner with the marketing team to develop your website bio.
- Complete 45-day check-in with Supervisor.
- Schedule regular 1-on-1 meetings with your supervisor (recommend every two weeks).
- Demonstrate an understanding of the STO/Attendance expectations.

WITHIN YOUR FIRST 90 DAYS

EXAMPLES:

- Attend and support business development efforts as assigned.
- Complete 90-day check-in with Supervisor.
- Shadow client onboarding and assist as directed.
- Demonstrate proficient understanding of firm technology and processes.
- Contribute to newsletter and social media efforts as directed.

WITHIN YOUR FIRST SIX (6) MONTHS

EXAMPLES:

- Begin teaching courses as assigned.
- Complete 6-month check-in with Supervisor
- Successfully transition into clients as assigned; assert yourself as primary relationship contact.
- Complete certification process for courses as assigned.
- Assist with Learning Plan updating process as directed.

WITHIN YOUR FIRST YEAR

Examples:

- Complete departmental and personal goals.
- Complete 1-year check in with supervisor.
- Build collaborative relationships with team members and clients.
- Support firm roadmap objectives and participate in the creation of new benchmarks.
- Demonstrate mastery of the performance expectations as outlined above.

ON-THE-JOB TRAINING TOPICS

Topics to be covered by Team Member 1:

- List items to be covered by the team member identified in the grid above.

Topics to be covered by Team Member 2:

- List items to be covered by the team member identified in the grid above.

Topics to be covered by Team Member 3:

- List items to be covered by the team member identified in the grid above.