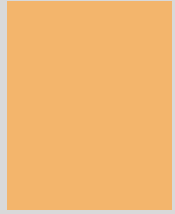




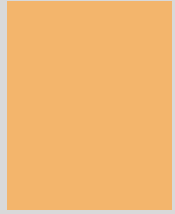
Onboarding Experience

YOUR FIRST SIX
MONTHS WITH (INSERT
TEAM NAME)

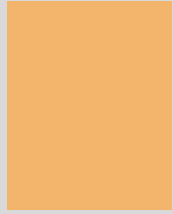
Welcome!



Executive
Photo



Executive
Photo



Executive
Photo



Executive
Photo

Welcome to our team!

(Here you can insert information about your organisation, the work the organisation or team does, and introduce your executive).

To ensure you feel welcome and supported as you embark on your journey with us, we have created an onboarding experience that will keep you connected and perhaps even entertained! We are all very excited to get to know you over the coming months.

What is the Onboarding Experience?

To help you get the most out of your onboarding experience, this interactive journey has been developed to guide you through how to set yourself up for success and launch your career with (organisation name)!

Before you begin, here are a few tips:

- ☆ We invite you to choose your own adventure by navigating through the [launch page](#) to the unique 'onboarding journey' for **your job position**.
- ☆ **Your position's 'onboarding journey'** recommends activities and experiences for you to work through during your **first six months**.
- ☆ Experiences that have been marked as **highly recommended** ☆ will help you establish yourself within the team, understand the fundamentals of what (insert organisation name) does and how we do it, and create professional relationships by building mutual trust and embracing our culture.
- ☆ Experiences that are marked as **recommended** ○, while not compulsory, will help build your understanding, skills and confidence and, most importantly, your professional and social support networks.
- ☆ Your Mentor, Buddy and colleagues are here to support you through your onboarding with (insert team name), remember to ask questions, take notes and ask for help when you need it.

Starting from home?

- ☆ If you are starting during lockdown or stay at home orders, you can follow the ['Stay at Home'](#) experience in conjunction with the journey for your job position.

Upon completion

- ☆ Please let your **Mentor and Manager** know once you've completed the (insert team name) onboarding experience!

Buddies and Mentor:

- ☆ If you are a buddy or Mentor, please check out the ['Onboarding Journey'](#) relevant to your new starter as well as the [Buddy and Mentor page](#).

Any Issues?

- ☆ If you have any feedback or notice any issues, please let the Onboarding team know by contacting (insert HR name).

Ready to launch?

CLICK ON YOUR ROLE TO LEARN ABOUT YOUR EXPERIENCE



JUNIOR MEMBER



MANAGER



SENIOR MANAGER



I'm a Buddy
or Mentor



I'm onboarding
from home



Junior Team member

(The following section is role specific – in your onboarding pack, you would tailor this to the levels of your organisation. Here you would include specific things you would want this person to tick off in their first month within the role.)

For example, activities to include would be:

- **Month 1:** meet an executive level member of the team, have coffee with 10 team members, introduce yourself to the team.
- **Month 2:** catch up with three members of the company from outside your team, attend a social work event, level up job-specific skills.
- **Month 3:** shadow a higher team member for a day, learn about the work the company does.
- **Month 6:** do a random act of kindness for someone, have coffee with a new starter, lead or contribute to a team meeting.

Junior Team Member

Key: ☆ Highly Recommended ○ Recommended

All Team

- | | | | | | |
|--|--|--|--|--|---|
| ☆ Join a <u>team-wide chat</u> and say "Hi"! | ○ Attend <u>team social events Occasional Drinks</u> | ☆ Start exploring and understanding the <u>broader company's work</u> | ○ Learn more about <u>the type of work another team in the organisation does</u> | ○ Learn more about one part of <u>the type of work the team does</u> | ☆ <u>Thank your buddy for all their help!</u> |
| ☆ Introduce yourself to your <u>buddy and mentor</u> | ☆ Learn about <u>the team members and services offered</u> | ☆ Meet someone from <u>another team</u> | ☆ Level-up your Microsoft skills: <u>Word, PowerPoint OneNote, Excel, PowerBI, Teams</u> | ○ Do a <u>random act of kindness</u> for someone | ☆ <u>Have coffee with a new starter!</u> |
| ☆ Meet an <u>executive level team member</u> | ☆ Catch up with <u>3 team members</u> for coffee | ☆ Learn about any organisational administration or management required for your role | ○ Learn about how to input expenses or filing into the system from your buddy | ☆ Participate in a <u>internal group or network meeting</u> | ☆ Let your mentor know you have <u>completed the onboarding experience!</u> |

Month:



Junior Team Members

- | | | | | | |
|---|---|---|---|---|--|
| ☆ Update your system information with help from your buddy | ○ Be involved in a <u>junior staff level team event</u> | ☆ <u>Shadow a Manager for a day</u> and familiarise yourself with their <u>role profile</u> | ○ Update your <u>LinkedIn</u> and make a relevant insight or interaction related to an area of interest | ○ Take notes from a key business meeting | ○ Lead or contribute to a <u>Team meeting</u> |
| ○ Complete <u>technical skills Training Course</u> e.g. PowerPoint* | ☆ Complete any workplace surveys | ○ Complete technical skills Training Course e.g. Excel | ○ Identify a <u>mentor</u> in your interest area and have 3 questions prepared to ask over coffee | ☆ Learn how to be a buddy | ☆ Seek <u>feedback</u> from someone you have worked with |
| ☆ Join <u>the team-wide group chat</u> and introduce yourself | ☆ Proofread and/or assist with the drafting of a <u>business document</u> | ○ <u>Be the first person to join (camera on) a team call</u> | ☆ Inform <u>your mentor</u> of new skills you have learnt since you started | ☆ Provide feedback or recognition through <u>Teams</u> , or email | ☆ <u>Be a Buddy</u> for a new junior member of staff |

Buddies and Mentors

(The following section is for buddies and mentors. Here you would include specific things you would want this person to help their buddy or mentee with.)

For example, activities to include would be:

- **Pre-arrival:** print a team photo board, book desks for the first week, reach out to the new starter the week before they commence.
- **Week 1:** use the photo board to help the new starter choose five colleagues to reach out to have coffee with, schedule time to complete timesheets or filing together, take the mentee out to lunch.
- **Month 1:** introduce the new starter to five people at a team meeting, have a weekly check-in, suggest some points to draft up as goals.
- **Months 2-3:** have an end-of-month check in, organise a 'shadow opportunity' for them, check if they are collecting feedback.

Buddies and Mentors

Key: Buddy; Buddy or Mentor; Mentor ☆ Highly Recommended ○ Recommended

Pre-arrival

- ☆ Print the organisation's photo board
- ☆ Book desks for the first week
- ☆ Book a welcome lunch with five team members in their first week
- ☆ Revisit the guidance on how to be a Buddy
- ☆ If commencing during lockdown or stay at home orders, please also follow the 'Stay at Home experience'
- ☆ Warmly welcome your new starter the week before they commence
- ☆ Revisit the firmwide guidance on Mentor role and Mentor training
- ☆ Touch base with their buddy to make sure you're both ready

Week 1

- ☆ If they're starting in lockdown, have a first day phone call followed by a daily check-in
- ☆ Use the photo board to help them choose 10 team members to meet for coffee
- ☆ Show them: how to use a Teams-enabled meeting room, the facilities, the coffee machine, hot water and dishwasher and more!
- ☆ Schedule time to complete timesheets or compulsory filing together
- ☆ Attend a welcome lunch
- ☆ Make sure the new starter has all of the meetings they need for the next 3 weeks
- ☆ Review the Onboarding Experience for their level and the page for Buddies and Mentors
- ☆ Take your mentee out for lunch, in their first week (separate to the welcome lunch)

Month 1

- ☆ Introduce your new starter to 5 people at a team-wide meeting that they haven't met before
- ☆ Have a weekly check-in (until they are happy to stop)
- ☆ Help them upload their information on the system and Teams
- ☆ Provide some examples of commonly used templates or documents
- ☆ Explain any end of month or end of period processes
- ☆ Suggest how to set some goals for the period
- ☆ Provide Mentor guidance on filling out time sheets and which meetings to attend
- ☆ Make sure they know where the role profile, admin, and information is kept

Months 2-3

- ☆ Have an end of month check-in with them & ask how they are going with the **Onboarding Experience**
- ☆ If they started in lockdown, make plans for their first day in the office
- Show your new starter how to join different social networks or committees
- ☆ Ask how they are going with the Onboarding Experience
- ☆ Organise their shadow opportunity in their third or fourth month
- ☆ Pre-brief your mentee on any probation check processes
- ☆ Check if and how they are collecting feedback
- ☆ At 6 months: celebrate "passing probation" period & completing the **Onboarding Experience!**

Onboarding from Home

(The following section is about starting the new job whilst working from home, but is dependent on business and role.

For example, activities to include would be:

- **Week 1:** power up laptop and ring IT to change your password, have a first day call with your buddy, be introduced on a team-wide call.
- **Week 2:** have three phone calls with your buddy, have three virtual coffees with team members, meet an executive level team member.
- **Week 3:** have two phone calls with your buddy, have a meeting with your mentor, attend virtual social team events.
- **Week 4:** have one phone call with your buddy, update your LinkedIn, have a virtual coffee with two team members.

Onboarding from Home



Key: ☆ Highly Recommended
○ Recommended

Week 1

- ☆ On Day 1, power up your laptop and ring IT to change your password
- ☆ Have a first day phone call with your buddy
- ☆ Complete your induction activities and training
- ☆ Have a daily call with your buddy
- ☆ Be introduced on a team-wide call by your buddy or Mentor
- ☆ Participate in Induction courses or workshops
- ☆ Attend a virtual lunch organised by your buddy with some of your peers in the team
- ☆ Have a introductory catch up with your Mentor
- ☆ **Join the organisation- or team-wide group chat and say "Hi!"**
- You made it through a week! Celebrate with a virtual team Drinks

Week 2

- ☆ Have three phone calls with your buddy
- ☆ Meet an executive level member of your team
- ☆ Attend the weekly team events and team-wide Lockdown drinks
- Post a photo about a hobby, pet or something quirky in the team-wide chat
- ☆ Attend all training sessions scheduled this week
- ☆ Have virtual coffees with three people identified by your buddy
- Volunteer to support any internal team initiatives underway

Week 3

- ☆ Have two phone calls with your buddy
- ☆ Start the Onboarding Experience
- ☆ Attend the weekly team events and team-wide Lockdown drinks
- Keep looking after yourself! We really encourage establishing healthy virtual working practices
- ☆ Have virtual coffees one person who had their camera ON from the weekly team call
- ☆ Have a second meeting with your Mentor
- ☆ Join a network or committee at work

Week 4

- ☆ Have one phone call with your buddy
- **Congratulations, you've made it through your first four weeks – virtually!**
- Attend a weekly team events or team-wide virtual drinks
- Volunteer to host / run a fun activity as a team event
- Explore internal learning opportunities and complete additional pathways and trainings that catch your interest
- ☆ Have virtual coffees with two people who have their camera OFF from the weekly team call
- Update your LinkedIn and make a relevant insight or interaction related to an area of interest