

New Hire Onboarding Program Template

Use this program template to give a new hire a coordinated path through preparation, orientation, role expectations, relationships, and milestones. Keep the phase names and review intervals used by the organization and connect each activity to a responsible role and completion evidence.

Complete the bracketed fields with approved information for the product, organization, or program being documented. Repeat the named forms where several tasks or subjects need separate records. Remove sections that do not apply and retain links to the material used to complete the document.

Document control	Entry
Document identifier	[Identifier used by your team]
Scope and applicable version	[Product, program, locations, and version covered]
Prepared and maintained by	[Responsible role or team]
Revision and review	[Revision, review date, and approval reference]

Program Overview

Identify the program's audience and scope before assigning activities. Keep the overall journey clear and show who supports the new hire at each stage.

Field	Complete with
Program identity	[Entity, location, role or employee group, program version, and purpose]
Journey	[Phase names, sequence, dependencies, and program completion definition]
Support roles	[New hire, manager, people team, buddy or mentor when applicable, and responsibilities]
Program administration	[Plan location, communication, update process, and contact route]

Before Day One

Prepare the information, access, and equipment needed for a workable start. Keep pre-start activities separate from work that belongs in orientation.

Field	Complete with
Welcome and logistics	[Approved welcome, first-day information, location or joining instructions, and contact]
Forms and learning	[Required forms, approved pre-start activity, access, and privacy reference]
Readiness	[Equipment, account, workspace, permissions, and dependency checks]
Tracking	[Activity, responsible role, completion evidence, unresolved issue, and handover]

First Day and First Week

Build an orientation agenda that gives the new hire the information and access needed to begin work. Use the organization's own timing and required activities.

Field	Complete with
Agenda	[Activity, purpose, responsible role, location or channel, and timing if defined]
Workspace and systems	[Access setup, equipment orientation, timekeeping, and verification]
Introductions	[Team, key partners, buddy or support contacts, and purpose of each connection]
Safety and security	[Approved briefing, required acknowledgments, emergency information, and evidence]

Compliance

Keep standing policies and requirements in one place and link to them from the phase activities. Use current approved material and identify the scope of each requirement.

Field	Complete with
Required policy	[Policy title, version, applicability, and authoritative access reference]
Training or form	[Requirement, responsible role, completion criterion, and evidence]
Employment terms	[Approved source for any program-specific employment or introductory-period information]
Tracking and help	[Acknowledgment or completion record, question route, and unresolved item]

Role and Expectations

Help the new hire understand the job, its boundaries, and the evidence of good performance. Keep formal role expectations distinguishable from initial learning goals.

Field	Complete with
Role purpose	[Responsibilities, customers or stakeholders, and the work the role produces]
Expected performance	[Approved expectations, measures or standards, and review process]
Initial work	[Task, prerequisites, support, expected result, and feedback arrangement]
Decision boundaries	[Authority, approvals, escalation, and related operating references]

Culture and Ways of Working

Explain how work gets coordinated and how the organization's stated values connect to practice. Link to approved policies where a rule needs to be followed.

Field	Complete with
Mission and values	[Approved mission, values, and relevant examples from organizational material]
Working practices	[Meetings, communication channels, collaboration, and handoff conventions]
Policies and norms	[Approved rule or convention, applicability, and source reference]
Questions and feedback	[How to ask for clarification, share feedback, or raise a concern]

Connection and Support

Give each support relationship a purpose so a new hire knows whom to approach. Keep role-based contact information current and identify alternatives where the program defines them.

Field	Complete with
Support map	[Role or team, reason to contact, channel, and alternative contact route]
Buddy or mentor	[Program purpose, responsibilities, expected interactions, and boundaries if applicable]
Stakeholders	[Relationship, work dependency, introduction activity, and expected collaboration]
Networks	[Approved communities, learning groups, support services, and access references]

Tools and Systems

Use one task record per system or setup activity that the program teaches. Keep credentials outside the document and verify a useful task after access is granted.

Field	Complete with
System and task	[System, purpose, intended user, and task outcome]
Prerequisites	[Account, role, permissions, device or software, and access reference]
Setup and use	[Ordered actions, exact labels, relevant precautions, and source guide]
Verification and support	[Expected result, evidence, troubleshooting reference, and help route]

Repeat this procedure for each supported task or variant. Place the applicable warning before the affected action and record a result that can be checked.

Step	Action	Expected result	Evidence
1	[One action using the exact interface label or approved command]	[Observable state]	[Check or record]
2	[Next action in dependency order]	[Observable state]	[Check or record]
3	[Verification or handover action]	[Completion condition]	[Retained evidence]

Onboarding Plan and Milestones

Maintain the written plan here and refer to it from the phase checklists. Set milestone names and intervals from the actual program rather than assuming a standard schedule.

Field	Complete with
Milestone	[Phase or review point, intended outcome, and timing defined by the program]
Activity plan	[Activity, responsible role, dependency, support, and completion evidence]
Check-in	[New-hire feedback, manager observation, progress, issue, and agreed next action]
Completion	[Approved completion criteria, evidence, decision role, and transition to ongoing development]

Onboarding Schedule

Phase or milestone	Goal and activity	Responsible role	Completion evidence	Review record
[Program milestone]	[Goal and activity]	[Role]	[Observable result]	[Feedback and action]

Help and Questions

Collect the recurring questions a new hire needs answered and keep each answer connected to the current program or policy. Provide a clear route for questions not covered here.

Field	Complete with
Question	[Recurring new-hire question and applicable role or location]
Answer	[Approved explanation and linked program, policy, or task reference]
Help route	[Responsible role, channel, alternative route, and information to provide]
Feedback and updates	[How to report unclear guidance and who maintains the program]