

ONBOARDING JOURNEY PLANNER

Purpose

Design a structured learning path that helps new team members ramp up effectively while building confidence and connection.

Instructions

Complete this worksheet for each new team member to create a personalized onboarding experience.

Part 1: New Team Member Profile

Name: _____

Role: _____

Start Date: _____

Primary strengths (from interview process): _____

Areas for development: _____

Learning preferences (if known): _____

Part 2: Knowledge and Skills Map

Map the essential knowledge areas and skills needed for success in this role:

Knowledge/Skill Area	Priority (H/M/L)	Current Familiarity	Best Learning Method	Team Resource Person

Part 3: Timeline Design

Week 1: Orientation and Foundations

Success looks like: _____

Key meetings to schedule:

- _____
- _____
- _____

Initial assignments/tasks:

- _____
- _____
- _____

Resources to provide:

- _____
- _____
- _____

Weeks 2-4: Guided Application

Success looks like: _____

Progressive responsibilities:

- _____
- _____
- _____

Check-in schedule:

- _____
- _____
- _____

Feedback mechanisms:

- _____
- _____
- _____

Months 2-3: Growing Independence

Success looks like: _____

Expanded responsibilities:

- _____
- _____
- _____

Development opportunities:

- _____
- _____
- _____

Success metrics:

- _____
- _____
- _____

Part 4: Team Integration Plan

Relationship Building

Key team relationships to foster:

- _____
- _____
- _____

Team integration activities:

- _____
- _____
- _____

Cultural norms to explicitly discuss:

- _____
- _____
- _____

Communication Setup

Communication channels to introduce:

- _____
- _____
- _____

Meeting cadence to establish:

- _____
- _____
- _____

Documentation to review:

- _____
- _____
- _____

Part 5: Check-in Schedule and Questions

30-Day Check-in

Date: _____

Questions to discuss:

- What's been most surprising about the role so far?
- Where do you feel you're making progress?
- Where do you need more support or clarity?
- What additional resources would be helpful?

- What are you enjoying most about the work?

60-Day Check-in

Date: _____

Questions to discuss:

- How are you progressing on your initial learning goals?
- Where do you feel confident? Where are you still building confidence?
- How is your workload - too much, too little, or about right?
- How are your relationships with team members developing?
- What suggestions do you have for improving any aspect of the team?

90-Day Check-in

Date: _____

Questions to discuss:

- What accomplishments are you most proud of in your first 90 days?
- What goals would you like to set for the next 90 days?
- How well does this role match your expectations so far?
- What additional training or development would be valuable?
- What feedback do you have about the onboarding process?

Additional Context:

Remember that effective onboarding is about much more than formal training. The most successful onboarding journeys:

- Deliberately build relationships and psychological safety
- Balance observation with hands-on experience
- Create early wins to build confidence
- Provide context, not just content
- Adapt based on the individual's needs and progress
- Include regular feedback in both directions

This approach not only accelerates time-to-productivity but also significantly improves retention - team members who experience thoughtful onboarding are 69% more likely to stay with the organization for 3+ years.

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