

# Onboarding Training Plan Template Example



## Employee Information

Employee Name	Alexandra Mattson	Start Date	MM/DD/YY	Position Held	Customer Service Representative
Department	Customer Service	Manager Name	Aviv Perez	Last Revised	MM/DD/YY

# Onboarding Training Schedule Example

Process / Monitor	Preparatory	Orientation	Integration	Long-Term Development	Digital Tools and Notes
Manager	Approve IT setup, finalize job details	Conduct team introductions, outline expectations	Review first project deliverables, assess adaptation	Conduct performance reviews, recommend skill development	Assignments and evaluation dashboards
	Clarify reporting structure and schedule first-week meetings	Check on the onboarding experience	Provide constructive feedback, guide role progression	Discuss long-term career path	
Human Resources	Send offer letter, process benefits & payroll	Present company policies, handbook, and compliance training	Ensure finalized benefits selections, assist in HR processes	Conduct retention survey, offer career guidance	HR self-service portal, benefits platform
	Confirm signed agreements and provide an onboarding checklist	Ensure completion of required forms & legal compliance	Track progress in training courses and address concerns	Encourage participation in leadership programs	
IT and Digital Systems	Set up workstation, email, and software access	Provide IT orientation, explain security policies	Monitor engagement with digital learning tools, troubleshoot issues	Recommend advanced training, introduce automation tools	IT help desk, software tutorials
	Grant access to internal systems, remote setup	Assign training for company software & communication platforms	Conduct cybersecurity refresher training	Evaluate tech proficiency for role advancement	
Peer Mentor	Assign mentor, schedule introduction	Guide through job shadowing, team dynamics	Provide role-specific feedback, assist with first projects	Help navigate cross-functional collaboration, encourage leadership	Internal chat platform, knowledge-sharing documents
	Share workplace culture insights and best practices	Encourage participation in team activities	Conduct informal check-ins for support	Recommend involvement in external learning opportunities	
Learning and Development	Assign onboarding courses, explain training expectations	Monitor completion of required training	Suggest intermediate courses, skill-building sessions	Support certification programs, leadership development	Learning management system, training portal
	Provide access to company learning resources.	Encourage participation in workshops and group discussions	Identify cross-training opportunities	Ensure continuous learning and career growth	
Team / Department Representative	Inform the team of the new hire, outline key tasks	Conduct job-specific training, assign first projects	Track progress and provide peer feedback	Offer leadership opportunities, support team-based initiatives	Department knowledge base, workflow guides
	Provide department-specific onboarding materials	Ensure smooth integration into department processes	Evaluate efficiency, address knowledge gaps	Encourage participation in industry events	

## Training Goals and Success Metrics Example

Phase	Goal	Success Metric	Evaluation Method
Week 1	Understand company policies, team structure, and job basics	100% completion of the onboarding checklist	HR & manager check-ins
First 30 Days	Gain functional knowledge and complete first assignments	Manager signs off on competency	Initial performance review
First 90 Days	Achieve proficiency in daily responsibilities	Employee self-assessment + manager review	Performance assessment
First 6 Months	Show confidence in your role, contribute to team projects	Peer and manager feedback	Mid-year performance review
Beyond First Year	Demonstrate growth, consider career path opportunities	Completion of additional training or mentoring	Career development meeting

## Evaluation and Feedback Example

Criteria	Employee Feedback (1-5)	Manager Feedback (1-5)	Areas for Improvement	Follow-Up Action	Next Check-In Date
Clarity of the onboarding process	4	5	Need more time for role expectations discussion	Schedule additional Q&A with the manager	MM/DD/YY
Effectiveness of training materials	3	4	Training modules lacked interactive content	Provide additional hands-on exercises	MM/DD/YY
Understanding of job responsibilities	4	4	More clarity on task prioritization	Assign job shadowing with a senior employee	MM/DD/YY
Support from mentors & managers	5	5	There were no significant issues; the mentor was invaluable	Continue regular mentor check-ins	MM/DD/YY
Overall onboarding experience	4	4	Could have used more team-building activities	Organize a department lunch or event	MM/DD/YY

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