READY-TO-USE TEMPLATE

A First-Month Onboarding Plan

A 30-day onboarding plan with learning goals, contributions, support, and review points.

45 minutes to prepare | 30-day onboarding plan

Use the supplied wording as it is, or change it together. The Word file and Notion template are editable. Keep only notes you need.

Set the purpose together

The manager drafts this, then revises it with the newcomer.

By the end of the first month, we want you to understand [service and people], contribute to [bounded work], and know where to get help. This is a learning plan. We will adjust it as we learn what the role requires.

Week 1 · Belong and find your bearings

Use the first-week Lab for the practical checklist.

Focus: meet the people, understand the purpose, get access, and try a supported first task.
Manager provides: context, introductions, a buddy, and time for questions.
Check: Can you find help? What still requires guessing?

Notes and changes for our situation

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WORKING AGENDA / CONTINUED

Week 2 · Follow the work

Choose a real piece of work from beginning to end.

Focus: see the handoffs, decision points, and the people affected.
Practice: explain the route back in your own words and ask what you missed.
Manager provides: access to experienced colleagues and examples.
Check: Which part of the process needs more context?

Week 3 · Own a bounded contribution

Authority should grow with context and agreed support.

Focus: carry one piece of work within clear boundaries.
Agree: outcome, decision freedom, quality checks, support, and escalation route.
Manager provides: a timely review and removal of avoidable blockers.
Check: What can we now step back from, and what still needs support?

Notes and changes for our situation

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WORKING AGENDA / CONTINUED

Week 4 · Review and reshape

Include the newcomer's observations about the environment.

What can you now do and explain? What still needs practice or context? Which part of our way of working helped or hindered you? What should the next month focus on? What will we change because of your perspective?

Keep a small shared record

This is a learning record, not a comparison with another newcomer.

Contribution to try:
Support and owner:
Evidence or example to discuss:
Review date:
What we changed after listening:
Next month's priority:

The thinking behind it

Onboarding is mutual learning. A newcomer is also showing the team what its habits look like from the outside.

Read When Mattering Isn't Enough by Nic Payne

Keep the useful part

A shared record, not a transcript. Agree what belongs here and what should stay private.

Date / people / purpose

What we agreed

Next step / owner / support / date

What remains open

When we will return to it

What has this new perspective shown us that familiarity hid?