**[A blue and white sign

Description automatically generated](https://www.smartsheet.com/try-it?trp=8779&utm_source=template-word&utm_medium=content&utm_campaign=Sample+Onboarding+Training+Plan-word-8779&lpa=Sample+Onboarding+Training+Plan+word+8779)Onboarding Training Plan Template Example**



Employee Information

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| --- | --- | --- | --- | --- | --- |
| 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

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| --- | --- | --- | --- | --- | --- |
| **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

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| --- | --- | --- | --- |
| **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

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| --- | --- | --- | --- | --- | --- |
| **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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