

Purple Sky
C o n s u l t i n g

Guide to Brilliant Onboarding

Preparation Template

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My Intentions For This Onboarding Experience

How will I make this onboarding experience memorable for the right reasons?

Who's Doing What?

What needs preparing? Who's doing it and by when?

Planning for Pre-Onboarding

Ideas On Connecting Before Day One

A large, empty white rectangular area intended for writing ideas on connecting before day one.

Notes From Call With Colleague

Notes on discussing use of personal information

A large, empty white rectangular area intended for taking notes from a call with a colleague regarding the use of personal information.

Confirm the Pre-Onboarding Plan

Final Pre-onboarding Plan

A large, empty rectangular box with a thin black border, intended for writing the final pre-onboarding plan.

Additional Notes

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Orientation Plan

What Needs To Be Included For The Orientation (Workplace And Online)

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Key Contacts For Introduction

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Who Will Be The Welcome Buddy

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Purpose And Goals

Purpose Of The Role

What are the required impacts of this role?

Long-term Goals

What are the expected performance outcomes and behaviours

Immediate Goals

What would success look like in the first twelve weeks and in the first year?

Setting Them Up For Success

For each of the six components to set your colleague up for success, identify what's needed to help you prepare a brilliant onboarding experience. Consider the Purpose and Goals you've identified to help identify the priorities.

Information

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Resources

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Relationships

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Setting Them Up For Success (continued)

Insights

Development

Support

Day One Planner

Where Will They Be On Day One?

Consider if they will be working remotely or in the workplace and the impact

Plan for Day One

Additional Notes

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