EMPLOYEE TRAINING & ONBOARDING PLAN

Sample portfolio document | Blue Cedar Wellness Clinic | Client Services Coordinator

Document owner	Version	Review cycle	Applies to
Operations Manager	1.1	Annually	Front office team

Purpose: Provide a structured, visually clear onboarding package that helps a new employee understand expectations, learn core workflows, and build confidence quickly through a guided two-week plan.

What this sample includes: a detailed onboarding roadmap, checklist and sign-off, training topic matrix, included resources, and 30-day follow-up guidance.



Detailed visual onboarding roadmap

Onboarding Checklist & Sign-Off

Use this checklist to confirm that each stage of onboarding has been completed and reviewed.

Stage	Item	Done	Owner	Notes
Pre-start	Offer accepted and start date confirmed	☐	Manager	
Pre-start	Welcome email sent with first-day details	☐	Manager	
Pre-start	System access requested and equipment prepared	☐	Manager	
Day 1	Introductions completed and workspace tour provided	☐	Trainer	
Day 1	Role overview, hours, and expectations reviewed	☐	Manager	
Week 1	Onboarding binder / key SOPs provided	☐	Trainer	
Week 1	Employee observed first live workflow demonstration	☐	Trainer	
Week 1	Employee practiced routine tasks with guidance	☐	Trainer	
Week 2	Scenario-based training completed	☐	Trainer	
Week 2	Independent practice reviewed for accuracy	☐	Trainer	
Week 2	Two-week review discussion completed	☐	Manager	
Week 2	Next 30-day goals documented	☐	Manager	

Recommended sign-off: Employee and manager should review the checklist together at the end of week 2 and confirm any remaining follow-up items.

Training Topic Matrix

This matrix outlines what should be covered during onboarding, how training should be delivered, and how completion is verified.

Topic	When	Training method	Resource / tool	Verification
Company overview and service standards	Day 1	Discussion	Welcome guide	Verbal check-in
Role expectations and priorities	Day 1	Manager review	Role profile	Sign-off
Systems navigation and file structure	Day 1–2	Demonstration	Access list	Guided practice
Client inquiry / intake process	Day 2–3	Shadowing + demo	SOP + script	Observed completion
Email and phone communication standards	Day 3	Demonstration	Templates	Sample responses
Scheduling / task coordination	Day 3–4	Guided practice	Checklist	Accuracy review
Escalation and urgent scenarios	Day 4	Scenario review	Decision table	Scenario Q&A
Independent routine task handling	Week 2	Practice	SOP binder	Completed work sample
Documentation and status updates	Week 2	Guided practice	Tracker	Supervisor review
Two-week recap and next steps	End Week 2	Discussion	Review form	Documented goals

Included onboarding resources

Welcome guide Quick overview of the business, contacts, expectations, and culture.	**Role expectations sheet** Core responsibilities, quality standards, and priorities.	**Access and systems list** Logins, links, shared folders, and required tools.
Core SOPs and scripts Daily process guides, scripts, and	**Training notes log** Space to capture questions,	**30-day follow-up form** Used to review confidence, progress,

reference templates.	feedback, and next steps.	and remaining support needs.

30-Day Follow-Up & Ongoing Support

A strong onboarding package continues beyond the first two weeks. Use this page to guide the employee's next development steps.

Suggested 30-day goals	30-day review discussion prompts
• Complete routine daily tasks with minimal guidance. • Use SOPs and templates independently. • Demonstrate understanding of escalation paths. • Communicate status updates clearly and consistently. • Raise questions proactively and document learning needs.	• What parts of the role feel most comfortable now? • Which processes still need clarification or more practice? • What tools or documents have been most helpful? • Where are errors or uncertainty still appearing? • What are the top three priorities for the next 30 days?

Manager notes / action items

Portfolio note: This sample is fictional and intended to demonstrate layout, clarity, and the types of onboarding resources Simply Structured Business Solutions can create for small businesses.