

Team *Onboarding Plan*

Gets a new team member from first day to useful work quickly, with access, context, people, and a clear first 30 days.

USE WHEN	OWNER	APPROACH	TIER
Anyone joins the team mid-project, including vendor staff	Hiring manager or PM · buddy supports	ALL	Standard

HOW TO USE THIS TEMPLATE

1. Start the plan as soon as a start date is known; request access first.
2. Fill sections 1 to 4 before day one; send them to the new member.
3. Agree the 30-day plan and first deliverables in week one.
4. Hold every check-in; sign section 9 when onboarding is done.
5. Delete guidance text (*italic*) before sharing.

New member ·
role ·
company

Start date ·
manager

Project · ID

Prepared by ·
version · date

Terms. Onboarding: the steps that help a new person do real work safely and fast. **Buddy** (common practice): a peer who answers everyday questions, separate from the manager. **Team charter** (PMBOK® Guide 6th Ed.): the team's agreed values and ground rules (T15).

1 Welcome and project context

Write this for the new person, in plain words. One short paragraph per row. Test: after reading it, they can explain what the project delivers and why it matters.

Welcome note · from

Project purpose and objectives
(T09)

Approach and how the team works
(T08, T15)

Where this role fits · what success
looks like

2 Access and tools checklist

List every system, folder, and tool the person needs, with the access level. Request access well before day one; late access is the most common onboarding delay. Use the storage and sensitivity rules in your configuration plan (T49). Test: nothing on this list is still pending on day one.

Lead time · request access this many working days before the start date

ITEM OR TOOL	SYSTEM OR LOCATION	ACCESS LEVEL	REQUEST BY	REQUESTED	READY	DONE

3 Key documents to read

Pick the few documents that matter most; don't send the whole library. Put the team charter first; new members read and sign it in week one (T15). Test: each document has a reason and a date.

DOCUMENT (ID)	WHY IT MATTERS FOR THIS ROLE	READ BY	DONE

4 People to meet

Name the people this role works with or depends on, and why. Book the meetings before day one. Test: every hand-off or approval the role touches has a name here.

NAME	ROLE	WHY MEET	WHEN	DONE

5 First 30 days, week by week

Set a focus for each week, the activities that serve it, and what the person can do by the end of it. Week one is access, context, and the charter; real work starts by week two. Test: the outcomes get harder each week and end in independent work.

WEEK	FOCUS	ACTIVITIES	OUTCOME BY END OF WEEK
Week 1			
Week 2			
Week 3			
Week 4			

6 Buddy

Choose a peer who knows the work and has time. Agree how much time and for how long. Test: the new person knows who to ask before they ask the manager.

Buddy · role	
Helps with	
Time agreed · until	

7 First deliverables

Give one to three small, real pieces of work with a clear done standard. Use the Definition of Done (T15) where it applies. Test: each can be finished and reviewed inside the first 30 days.

DELIVERABLE	DONE STANDARD	DUE	REVIEWER	DONE

8 Check-in schedule

Short, booked conversations: what's going well, what's blocked, what's next. Record any blocker as an action (T55). Test: no check-in is skipped, and every blocker has an owner.

CHECK-IN	DATE	WITH	FOCUS	NOTES · ACTIONS
End of day 1				
End of week 1				
Day 15				
Day 30				
Ceremonies				
ADAPTIVE / HYBRID ONLY				

9 Onboarding complete

Sign when the 30-day outcomes are met, or record what is still open and a new date. Test: access, charter, and first deliverable are all done.

Outcomes met · anything still open	
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New member · date

Manager or PM · date

Buddy · date

COMPLETED EXAMPLE · ILLUSTRATIVE

Client Onboarding Portal · Northfield Creative Group (fictional marketing and design agency)

New member: Theo Park, Clearpath configuration consultant, joins the team for Sprint 2 to add capacity on CRM integration (US-12). Start Thu Mar 4, 2027. Manager on the project: Amy Price (PM); Clearpath delivery lead for employment matters.

Buddy: Nadia Ellis, Clearpath configuration consultant. Prepared by Amy Price, v1.0 Mon Mar 1, 2027.

1 · Context

Purpose

Cut client onboarding from 5 to 2 days, 90% online within 3 months of launch, zero confidentiality incidents (Obj 1 to 3).

How we work

Hybrid: portal in two-week sprints (Wed to Tue); contracts, privacy, migration, and training planned up front. Stand-up 9:30 Central; Clearpath joins 11:00 to 3:00 Central.

Your part

Configure the CRM contact sync (FR-03, US-12): 15-minute sync, no duplicates. Success: US-12 accepted at a sprint review.

2 · Access

ITEM	ACCESS	REQUESTED	READY
Project site (Internal)	Edit	Mar 1	Mar 2
Team channel and task board	Member	Mar 1	Mar 2
Clearpath admin console (Confidential)	Configure	Mar 1	Mar 2
CRM sandbox and test data	Read and write	Mar 3	Mar 9
Restricted contracts folder	None needed	n/a	n/a

Lead time was blank in v1.0. The CRM sandbox needs Priya Shah's team and a privacy check; requested two days before start, it was ready Mar 9 (I-03). Lead time is now 5 working days (T33 v1.1).

3 · Read · 4 · Meet

ITEM	WHY	BY
Team charter (T15), sign it	Ground rules, DoD, meeting times	Mar 5
Release plan (T26)	Sprint dates, what Release 1 holds	Mar 5
US-12 card (T25), CRM spec WBS 1.3	The work itself and its acceptance criteria	Mar 4
Priya Shah, IT Manager	CRM owner; sandbox; sync design	Mar 4
Elena Torres, Contracts & Privacy	What client data may be copied (CO-01)	Mar 5
Marcus Reyes, product owner	Accepts US-12 at review	Mar 4

5 · First 30 days

WEEK	FOCUS	OUTCOME
1 (Mar 4)	Access, charter, pair with Nadia	Charter signed Mar 5; CRM sandbox open (slipped to Mar 9)
2 (Mar 8)	US-12 sync build in pairing	Sync runs in sandbox; duplicate defect found Mar 12 (I-01)
3 (Mar 15)	Fix duplicates with Priya	Pairing ends Mar 16 (T37 D2); fix plan agreed
4 (Mar 22)	Works alone; retest	Retest Mar 24; US-12 into Sprint 3

Amy Price · Team Onboarding Plan · v1.0

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7 · First deliverable · 8 · Check-ins

ITEM	DETAIL
US-12 contact sync	Meets its three acceptance criteria and the DoD; reviewer Marcus Reyes
Day 1 (Mar 4)	Amy · blocker: no CRM sandbox; logged as I-03
Week 1 (Mar 9)	Amy and Priya · access open; I-03 closed
Day 15 (Mar 18)	Amy · duplicates (I-01) are the focus
Day 30 (Apr 2)	Amy, Nadia · onboarding complete; signed Apr 2

Reading the example. The plan worked except for one row, and that row cost the team five days of a flat burndown in Sprint 2 (T57). The fix was not "try harder": the lead time became a field on this template and a rule in the resource plan (T33). For vendor staff, the PM manages project onboarding; their own company stays their employer, so recognition and performance go through Clearpath (T36). After go-live, new Northfield coordinators use this same plan, and learn the portal in week one (T51).