

## **EMPLOYEE NAME Onboarding Plan**

Development “Buddy”: \_\_\_\_\_

Materials: Onboarding Booklet + \_\_\_\_\_ Teams Channel

Access:

- Email Lists: Development, Monday Memo & Green Folder (Kari), Specific teams (manager)
- Give access to Development Teams (Kari) and private channels (relevant channels)
- Add to recurring meetings: Development (Kari), Specific teams (manager) set up weekly meetings with Manager
- Access to RE after training
- Access to Power BI after Ellen training

### **Priorities:**

#### **1<sup>st</sup> Month – MONTH**

Get to know the Development team, required CI trainings and sign-ups, Friday readings

- Week 1 (**DATES**)
  - Day 1 – HR day!
  - Day 2 – **Supervisor** day!
  - Day 3 – complete HR paperwork, review Intranet and CI people
- Week 2 (**DATES**)
  - Meetings with immediate team: **Name (title/topic)**
  - Weekly Check in with **Supervisor**
  - Team Meetings - \_\_\_\_\_

- Friday readings/admin – Business World, Order cards, required trainings
- Week 3 (**DATES**)
  - Meetings with expanded team: **Name (title/topic)**
  - Supervisor 1:1
  - Team meetings – \_\_\_\_\_
  - Friday readings/admin – Annual Reports, Impact Reports, FY goals, Timesheet due
- Week 4 (**DATES**)
  - Meetings with expanded team: **Name (title/topic)**
  - Supervisor 1:1
  - Team meetings – \_\_\_\_\_
  - Friday readings/admin – Campaign, Strategic Plan
- Week 5 (**DATES**)
  - Meetings with expanded team: **Name (title/topic)**
  - Friday readings/admin –Events, Financials

Tools to access and be familiar with:

- RE/CRM
- Power BI/Reporting
- Online Giving tool
- Teams/ SharePoint

## **2<sup>nd</sup> Month – MONTH**

**Areas of focus:** (i.e Get to know Embedded Fundraisers and B+C Partners, get acquainted with CI tools, Develop FY22 Goals, Begin to identify portfolio)

Embedded/Program Fundraisers to meet (if relevant)

Brand +Communications Partners to meet (if relevant)

Key Events/Days

- Major retreats/meetings
- Holidays

### **3<sup>rd</sup> Month – MONTH**

Areas of focus (ie: Get acquainted with programs and field teams, start outreach to EOY givers in portfolio and through Giving Tuesday opportunities, Partnership with Events for upcoming webinar, develop draft program metrics and recognition levels to share with DLT)

Program Partners to meet

Key Events/Days