

INVESTING IN YOUR TEAM

Building an Intentional Onboarding and Training Plan



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IMPORTANCE OF HAVING A PLAN

1 IN 5 EMPLOYEES REPORT HAVING A POOR EXPERIENCE



STRONG ONBOARDING PROCESSES INCREASE RETENTION BY 82%



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ONBOARDING TIMELINE

The preparation period before the employee starts, ensuring all systems, materials, and expectations are ready for a smooth first day.	A developmental week where the employee begins hands-on training, shadowing and getting acclimated to the office processes.	The ongoing commitment to continuous learning, support, and development that keeps employees growing long after their initial onboarding period.		
Preboarding	First Day	First Week	First 90 Days	Everboarding
	An orientation-focused introduction that welcomes the employee, builds early connection, and provides a clear picture of their role and the office.		A structured learning and development phase where the employee deepens skills, gains independence, and begins contributing confidently to daily operations.	

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PREBOARDING

- Email Employee
- First Day Schedule
- Request Necessary Accesses
- Assign a Buddy
- Prepare a menu/checklist of tasks
- Invite to Chats/Teams/Meetings
- Prepare a space



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WELCOME EMAIL

- Welcome them and tell them you are excited for them to start!
- Reiterate start day and time, clarify breaks
- Parking Instructions
- Dress Code
- Anything they might need for first day
- Any other helpful information



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FIRST DAY

- Provide a Tour and Make Introductions
- Set up meetings for any required tasks (Payroll, etc)
- Make sure employee is able to access their system, access email and other important applications
- Review important policies and office information
- Schedule a campus tour
- Schedule a task with their Buddy
- Give plenty of downtime



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FIRST WEEK

- Acclimate to the team
 - One on One trainings
 - Shadowing
 - Full Group meeting and team building
- Start high level financial aid training
- Start on self-paced trainings and "Menu" Items
 - FSA Basics
 - NASFAA New Aid Officer Training
- Start on simple tasks



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FIRST 90 DAYS

- Check in regularly
- Adapt to their learning style
- Be sure timelines and goals are clearly identified
- Identify areas of difficulty
- Celebrate achievements and progress
- Ensure they are being acclimated to the people and purpose of the office



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EVERBOARDING

- Learning and development should never cease
- This can look like:
 - Team connection
 - Regularly scheduled trainings
 - Retreats
 - Mentorship



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TRAINING

- Make it consistent
- Involve the whole office
- Create visuals and resources
- Use resources already available



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TAKEAWAYS

- Spend some time preparing and have a plan!
- Review and adjust as needed
- Support connection and integration
- Continue the learning, growth, and integration for the whole career



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THANK YOU!

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