3-Day Onboarding Plan: New IT Team Member

This structured 3-day onboarding plan is designed to efficiently integrate a new IT team member, focusing on essential orientation, system access, initial tasks, and an introduction to performance standards. The goal is to provide a comprehensive and supportive start, ensuring the new hire feels welcomed, equipped, and ready to contribute.

Day 1: Welcome & Foundation

Focus: Welcome orientation, office tour, system login setup, and company policies overview.

Morning (9:00 AM - 1:00 PM)

- **9:00 AM - 9:30 AM: Welcome & Introductions**
  - **Meet the Team Lead:** A personal welcome from their direct supervisor to set a positive tone.
  - **Immediate Team Introductions:** Brief introductions to immediate team members, fostering a sense of belonging.
  - **Office Tour:** A quick tour of the office space, highlighting their workstation, common areas (break room, restrooms), and emergency exits.
  - **Welcome Packet:** Provide a physical or digital welcome packet containing the company handbook, benefits summary, and a list of key contacts (HR, IT Helpdesk).
- **9:30 AM - 11:00 AM: HR & Administrative Setup**
  - **HR Paperwork:** Complete essential HR forms (payroll, tax documents, emergency contacts).
  - **Company Policy Overview:** A high-level introduction to core company policies, emphasizing IT security, code of conduct, and communication guidelines.
- **11:00 AM - 1:00 PM: Initial System Login Setup**
  - **Hardware Setup:** Ensure their company laptop/desktop and essential peripherals are set up and functional.
  - **Email & Basic Accounts:** Guide them through setting up their company email account and initial login to the primary communication platform (e.g., Microsoft Teams, Slack).
  - **Password Management:** Introduce and set up the corporate password management tool, emphasizing security best practices.

Afternoon (2:00 PM - 5:00 PM)

- **2:00 PM - 3:30 PM: Department & Role Overview**
  - **Team Lead Discussion:** In-depth conversation with the Team Lead about the IT department's mission, team structure, current projects, and the new team member's specific role and responsibilities.
  - **Organizational Context:** Explain how the IT department supports the broader organization's goals.
- **3:30 PM - 4:30 PM: Introduction to Company Culture & Values**

    - Discuss company values, work-life balance expectations, and opportunities for professional development.
    - Introduce them to any internal social platforms or employee resource groups.
- **4:30 PM - 5:00 PM: Q&A and Day 1 Wrap-up**
    - Address any initial questions or concerns.
    - Review Day 1 activities and set expectations for Day 2.

Day 2: Integration & Shadowing

Focus: Meet the team, shadowing, configure access to Jira, Helpdesk, and email.

Morning (9:00 AM - 1:00 PM)

- **9:00 AM - 10:30 AM: Deeper Team & Cross-Functional Introductions**
    - **Extended Team Meet & Greet:** Introduce the new hire to other key members of the IT department and relevant cross-functional teams (e.g., Development, Operations, Sales Support).
    - **Role of Each Team:** Briefly explain the function of each team and how they interact with IT.
- **10:30 AM - 1:00 PM: Core System Access Configuration**
    - **Jira/Project Management Tool:** Configure full access to Jira (or equivalent project management/bug tracking system) and provide an overview of how tasks are managed and tracked.
    - **Helpdesk System:** Set up access to the primary Helpdesk/Ticketing system (e.g., ServiceNow, Zendesk). Explain ticket workflows, priority levels, and escalation paths.
    - **Email Deep Dive:** Review advanced email features, shared mailboxes, and specific communication protocols relevant to IT support.
    - **Network Drives & Shared Resources:** Configure access to relevant network drives, shared folders, and internal documentation repositories (e.g., Confluence, SharePoint).

Afternoon (2:00 PM - 5:00 PM)

- **2:00 PM - 4:00 PM: Shadowing Live Operations**
    - **Shadow an Experienced Colleague:** Pair the new hire with an experienced IT team member to shadow live support calls, troubleshooting sessions, or project tasks. This provides practical insight into daily operations.
    - **Observe Best Practices:** Focus on observing customer interaction techniques, problem-solving methodologies, and the use of diagnostic tools.
- **4:00 PM - 5:00 PM: Knowledge Base & Documentation Review**
    - **Familiarization:** Guide them through the team's knowledge base and documentation standards.
    - **Contribution Guidelines:** Explain how to search for solutions and how to contribute new articles or update existing ones.
    - **Daily Debrief:** A short debrief with the shadowing mentor or Team Lead to discuss observations and answer questions from the day.

Day 3: Application & Performance Readiness

Focus: Assign basic tasks, introduce service KPIs, ticket handling workflows, and performance goals.

Morning (9:00 AM - 1:00 PM)

- **9:00 AM - 11:00 AM: First Hands-On Assignments (Guided)**
  - **Basic Tasks:** Assign simple, low-impact tasks with close supervision. Examples include:
    - Performing a password reset for a test account.
    - Installing a standard software application on a test machine.
    - Updating a minor section of the knowledge base.
    - Categorizing a few incoming non-urgent tickets.
  - **Guided Troubleshooting:** Walk through a common, documented troubleshooting process with them, allowing them to perform steps under guidance.
- **11:00 AM - 1:00 PM: Introduction to Service KPIs & Standards**
  - **Key Performance Indicators (KPIs):** Detailed explanation of individual and team KPIs relevant to their role (e.g., average resolution time, first-contact resolution rate, customer satisfaction scores, ticket backlog management).
  - **Service Standards:** Review specific service standards and expectations for customer interaction, response times, and quality of support.
  - **Reporting Tools:** Briefly introduce them to any dashboards or reporting tools used to track these metrics.

Afternoon (2:00 PM - 5:00 PM)

- **2:00 PM - 3:30 PM: Deep Dive into Ticket Handling Workflows**
  - **End-to-End Process:** Review the complete lifecycle of a ticket from creation to closure, including escalation procedures and inter-team handoffs.
  - **Communication Protocols:** Emphasize internal and external communication protocols for ticket updates.
  - **Scenario-Based Discussion:** Discuss various ticket scenarios and how to approach them effectively.
- **3:30 PM - 4:30 PM: Setting Performance Goals & Development Path**
  - **Initial Goals:** Work with the Team Lead to set initial, achievable performance goals for their first 30-60-90 days.
  - **Professional Development:** Discuss opportunities for ongoing training, certifications, and career progression within the IT department.
  - **Mentorship:** If applicable, formally introduce them to their assigned mentor for ongoing support.
- **4:30 PM - 5:00 PM: Final Q&A & Next Steps**
  - Open floor for any remaining questions.
  - Reiterate expectations for the coming weeks.
  - Schedule a formal 1-week and 1-month check-in meeting to ensure continued support and progress.