

Volunteer Onboarding Flow

A Tangency Action Kit

Snapshot

- ****Focus:**** Organizing Operations
- ****Format:**** Workflow
- ****Time:**** Build once, automate
- ****Ideal team:**** Operations + team leads
- ****Great for:**** Rapid scaling, fellowship launches, distributed chapters
- ****Deliverable:**** Automated journey map + task assignments
- ****Materials:**** Email platform, calendar tool, intake survey, buddy roster

Flow overview

Three touch points—instant welcome email, orientation session, and first assignment with a buddy check-in—move supporters from sign-up to action within five days. Track conversions between each stage to improve scripts.

Prep checklist

1. Write a welcome email naming two immediate roles people can take.
2. Create an intake survey capturing skills, schedule, and languages.
3. Block recurring 30-minute orientation sessions.
4. Recruit a “buddy bench” of experienced volunteers willing to shadow newcomers.

Implementation

1. ****Day 0 – Email.**** Auto-send the welcome note with intake survey + Calendly link.
2. ****Day 2 – Orientation.**** Cover mission, campaigns, culture norms, and end with a menu of starter tasks. Get every attendee to choose one live.
3. ****Day 3 – Assignment.**** Team leads receive the survey + task choice and send a direct intro to the buddy and project lead.
4. ****Day 5 – Buddy check-in.**** Buddies confirm progress, troubleshoot, and log blockers in the onboarding tracker.

Tips

- Measure conversion: first-task completions ÷ total sign-ups.
- Record a 5-minute orientation video for people who miss the live session.
- Celebrate Day 5 wins publicly to reinforce rapid action.

Tools & templates

- Onboarding journey map
- Orientation slide deck + script
- Buddy follow-up form with conversion tracking