Onboarding Guide Template

When developing an onboarding document for a team, it should contain details of engagement scope, team processes, codebase, coding standards, team agreements, software requirements and setup details. The onboarding guide can be used as an index to project specific content if it already exists elsewhere. Allowing this guide to be utilized as a foundation with the links will help keep the guide concise and effective.

Overview and Goals

- List a few sentences explaining the high-level summary and the scope of the engagement.

- Consider adding any additional background and context as needed.

- Include the value proposition of the project, goals, what success looks like, and what the team is trying to achieve and why.

Contacts

- List a few of the main contacts for the team and project overall such as the Dev Lead and Product Owner.

- Consider including the roles of these main contacts so that the team knows who to reach out to depending on the situation.

Team Agreement and Code of Conduct

- Include the team's code of conduct or agreement that defines a set of expectation from each team member and how the team has agreed to operate.

- Working Agreement Template - working agreement

Dev Environment Setup

- Consider adding steps to run the project end-to-end. This could be in form of a separate wiki page or document that can be linked here.

- Include any software that needs to be downloaded and specify if a specific version of the software is needed.

Project Building Blocks

- This can include a more in depth description with different areas of the project to help increase the project understanding.

- It can include different sections on the various components of the project including deployment, e2e testing, repositories.

Resources

- This can include any additional links to documents related to the project

- It may include links to backlog items, work items, wiki pages or project history.