

Role-Specific Onboarding SOP Template

Document Title:	[Insert Role Name] Onboarding Standard Operating Procedure
Department:	[Insert Department Name]
Document Owner:	[Insert Owner Name/Title]
Last Updated:	[Insert Date]
Version:	[Insert Version Number]

How to Use This Template: Replace all text in [brackets] with your specific information. Check boxes [] as tasks are completed. Customize sections based on your role and company needs.

1. COMPANY OVERVIEW

1.1 Company Mission & Vision

[Describe your company's mission statement and core vision. Explain what the company does, who it serves, and what makes it unique in the market.]

1.2 Core Values & Culture

[List and explain your company's core values. Include specific examples of how these values are demonstrated in daily work and decision-making.]

Value 1:	[Value name and description]	[]
Value 2:	[Value name and description]	[]
Value 3:	[Value name and description]	[]
Value 4:	[Value name and description]	[]

1.3 Organizational Structure

[Describe the company's organizational structure. Include reporting lines, key departments, and how the new hire's role fits into the bigger picture.]

CEO/Founder:	[Name]	[Email]
Department Head:	[Name]	[Email]
Direct Manager:	[Name]	[Email]
HR Contact:	[Name]	[Email]

IT Contact:	[Name]	[Email]
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2. ROLE-SPECIFIC INFORMATION

2.1 Position Overview

Position Title:	[Insert exact job title]
Department:	[Insert department name]
Reports To:	[Insert manager title/name]
Location:	[Insert office location or Remote]
Employment Type:	[Full-time/Part-time/Contract]

2.2 Key Responsibilities

[List the primary responsibilities and duties for this role. Be specific about daily, weekly, and monthly tasks.]

Priority	Responsibility Description	Frequency	Review
High	[Primary responsibility 1]	[Daily/Weekly/Monthly]	[]
High	[Primary responsibility 2]	[Daily/Weekly/Monthly]	[]
High	[Primary responsibility 3]	[Daily/Weekly/Monthly]	[]
Medium	[Secondary responsibility 1]	[Daily/Weekly/Monthly]	[]
Medium	[Secondary responsibility 2]	[Daily/Weekly/Monthly]	[]
Low	[Additional responsibility 1]	[As needed]	[]
Low	[Additional responsibility 2]	[As needed]	[]

2.3 Success Metrics & KPIs

[Define how success will be measured in this role. Include specific KPIs and performance indicators.]

KPI/Metric	Target	Measurement Frequency
[Metric 1]	[Target value/goal]	[Daily/Weekly/Monthly/Quarterly]
[Metric 2]	[Target value/goal]	[Daily/Weekly/Monthly/Quarterly]
[Metric 3]	[Target value/goal]	[Daily/Weekly/Monthly/Quarterly]
[Metric 4]	[Target value/goal]	[Daily/Weekly/Monthly/Quarterly]

3. ROLE-SPECIFIC TRAINING

3.1 Training Curriculum

[Outline all training modules, courses, and learning activities required for this role. Include estimated time for completion and priority level.]

Training Module	Duration	Owner	Timeline	Status
[Training topic 1]	[Hours/Days]	[Trainer name]	[Week 1]	[]
[Training topic 2]	[Hours/Days]	[Trainer name]	[Week 1]	[]
[Training topic 3]	[Hours/Days]	[Trainer name]	[Week 2]	[]
[Training topic 4]	[Hours/Days]	[Trainer name]	[Week 2]	[]
[Training topic 5]	[Hours/Days]	[Trainer name]	[Week 3]	[]
[Training topic 6]	[Hours/Days]	[Trainer name]	[Month 1]	[]

3.2 Shadowing & Mentorship

[Identify team members the new hire should shadow and learn from. Specify what they should observe.]

Team Member	Focus Area	Duration	Scheduled	Complete
[Name/Role]	[What to learn]	[Hours/Days]	[Date/Week]	[]
[Name/Role]	[What to learn]	[Hours/Days]	[Date/Week]	[]
[Name/Role]	[What to learn]	[Hours/Days]	[Date/Week]	[]

3.3 Required Certifications & Compliance

[List any mandatory certifications, licenses, or compliance training required for this role.]

Certification/Training	Provider	Deadline	Status
[Certification name]	[Training provider]	[Date/Timeline]	[]
[Certification name]	[Training provider]	[Date/Timeline]	[]
[Certification name]	[Training provider]	[Date/Timeline]	[]

4. TOOLS & SYSTEMS ACCESS

4.1 Required Tools & Software

[List all software, tools, and systems the new hire needs access to. Include login instructions and key resources for each tool.]

Tool/System Name	Purpose	Access Level	Setup Owner	Status
[Tool name]	[What it is used for]	[Admin/User/View]	[IT/Manager]	[]
[Tool name]	[What it is used for]	[Admin/User/View]	[IT/Manager]	[]
[Tool name]	[What it is used for]	[Admin/User/View]	[IT/Manager]	[]
[Tool name]	[What it is used for]	[Admin/User/View]	[IT/Manager]	[]
[Tool name]	[What it is used for]	[Admin/User/View]	[IT/Manager]	[]
[Tool name]	[What it is used for]	[Admin/User/View]	[IT/Manager]	[]

4.2 Communication Channels

[List the primary communication channels and which ones to use for different purposes.]

Channel	Purpose/Use Case	Key Groups/Channels	Setup
[Email/Slack/Teams]	[When to use this]	[Channel names]	[]
[Email/Slack/Teams]	[When to use this]	[Channel names]	[]
[Email/Slack/Teams]	[When to use this]	[Channel names]	[]

4.3 Key Documentation & Resources

[Provide links or locations for important documentation, wikis, shared drives, and reference materials.]

Resource Name	Location/Link	Description	Review
[Document name]	[URL or file path]	[What it contains]	[]
[Document name]	[URL or file path]	[What it contains]	[]
[Document name]	[URL or file path]	[What it contains]	[]
[Document name]	[URL or file path]	[What it contains]	[]

5. 30-60-90 DAY GOALS

[Define clear, measurable goals for the new hire's first 30, 60, and 90 days. These should align with the role's responsibilities and success metrics.]

5.1 First 30 Days: Learning & Orientation

Focus: Learn the basics, understand the role, build relationships, and complete initial training.

Goal/Objective	Success Criteria	Status
[Learning goal 1]	[How success is measured]	[]
[Learning goal 2]	[How success is measured]	[]
[Learning goal 3]	[How success is measured]	[]
[Relationship goal 1]	[How success is measured]	[]
[Task completion goal 1]	[How success is measured]	[]

5.2 Days 31-60: Contributing & Growing

Focus: Take on projects, contribute to team goals, and demonstrate growing competence.

Goal/Objective	Success Criteria	Status
[Project goal 1]	[How success is measured]	[]
[Project goal 2]	[How success is measured]	[]
[Skill development goal 1]	[How success is measured]	[]
[Contribution goal 1]	[How success is measured]	[]
[Initiative goal 1]	[How success is measured]	[]

5.3 Days 61-90: Ownership & Impact

Focus: Take full ownership of responsibilities, drive results, and operate independently.

Goal/Objective	Success Criteria	Status
[Ownership goal 1]	[How success is measured]	[]
[Impact goal 1]	[How success is measured]	[]
[Independent work goal 1]	[How success is measured]	[]

[Strategic goal 1]	[How success is measured]	[]
[Team contribution goal 1]	[How success is measured]	[]

6. CHECK-INS & FEEDBACK SCHEDULE

[Define when and how feedback will be provided. Regular check-ins help ensure the new hire stays on track and feels supported.]

Check-in Type	Frequency	Participants	Focus Areas	Schedule
Daily stand-up	[Daily/As needed]	[Manager/Team]	[Quick updates, blockers]	[]
Weekly 1-on-1	[Weekly]	[Manager/Employee]	[Progress, questions, support]	[]
30-day review	[Day 30]	[Manager/HR/Employee]	[First month feedback]	[]
60-day review	[Day 60]	[Manager/Employee]	[Progress on goals]	[]
90-day review	[Day 90]	[Manager/HR/Employee]	[Full performance review]	[]

7. ADDITIONAL NOTES & CUSTOMIZATION

[Add any role-specific notes, special considerations, or additional information relevant to this position.]

Additional Notes:	

Document Approval

Prepared By: [Name/Title]

Date: [Date]

Reviewed By: [Manager Name]

Date: [Date]

Approved By: [HR/Leadership]

Date: [Date]