Employee Training & Onboarding Guide

A welcoming, structured first-week experience for a small professional office.

SIMULATED PORTFOLIO SAMPLE | Illustrative organization and procedures; not an actual employer handbook.

Purpose & learning outcomes

This guide demonstrates how I would organize onboarding for a new administrative support employee. It combines a predictable schedule, clear procedures, hands-on practice, and supportive check-ins to reduce first-week uncertainty.

By the end of the first week, a new employee should be able to:

• Locate shared resources and identify the correct point of contact for questions.

• Follow basic document naming, filing, and version-control procedures.

• Receive, prioritize, and route routine administrative requests.

• Communicate task status and escalate uncertain or sensitive requests.

Training approach

Welcome → Demonstrate → Practice → Review. Explain the purpose of each task, show one example, allow guided practice, and check understanding without putting the learner on the spot.

Sample training environment

A fictional 12-person professional office with a shared document drive, central administrative inbox, request tracker, and supervisor approval process. Actual policies, access rights, privacy rules, and software would be confirmed before use.

01 / FIRST-WEEK PLAN

A manageable, confidence-building schedule

Day	Focus	Practice / checkpoint
1 · Welcome	Introductions, workspace setup, access, contacts, expectations	Find key resources; confirm who to ask for help
2 · Documents	File naming, folder structure, document templates	Save and retrieve a sample document
3 · Requests	Inbox triage, task priority, routing	Process three fictional requests
4 · Communication	Status updates, handoffs, confidentiality, escalation	Draft a clear status update
5 · Review	Independent practice, questions, feedback	Complete mini-scenario and review together

Day-one welcome checklist

- ☐ Introduce colleagues and identify a designated onboarding contact.
- ☐ Confirm workstation comfort, approved tools, and access permissions.
- ☐ Explain work hours, break practices, and how to ask for assistance.
- ☐ Walk through the shared folder structure and sample documents.
- ☐ Demonstrate one simple task; invite questions and guided practice.
- ☐ End with a short check-in: What feels clear? What needs another example?

Trainer note

Avoid information overload. Give new employees a short written reference sheet, use plain language, and reinforce that asking questions is part of learning—not a sign of failure.

Procedure A: Save and organize a document

• Confirm the document type and whether it contains sensitive information.

• Select the approved shared folder and verify access restrictions.

• Use the naming convention: YYYY-MM-DD_Project_DocumentType_v01.

• Save the file; reopen it to confirm it is readable and in the right location.

• If updating an existing file, follow the office version-control procedure rather than overwriting an approved record.

Example: 2026-10-27_OfficeSetup_MeetingNotes_v01.docx

Procedure B: Handle an administrative request

• Read the request completely; note requester, deadline, and desired outcome.

• Check whether it is routine, time-sensitive, or requires approval.

• Record the task in the approved tracker with owner and due date.

• Complete authorized work or route to the correct colleague.

• Send a concise acknowledgment or status update, then mark the final outcome.

When to escalate

Pause and ask a supervisor when instructions conflict, an authorization is unclear, a deadline cannot be met, or a request may involve confidential information. Do not guess or share restricted information.

Sample status update

“I received the request for the updated meeting packet. I have confirmed the source documents and expect to have the draft ready for review by 2:00 p.m. I will flag any missing items before then.”

03 / PRACTICE & EVALUATION

Guided practice: The morning inbox

Scenario: It is 9:00 a.m. Three fictional messages arrive in the shared administrative inbox:

• A manager requests a standard meeting agenda template for a 2:00 p.m. meeting.

• A colleague asks for a confidential personnel file that is not within your approved access.

• A team member reports that a shared document link is broken and needed for a 10:00 a.m. call.

Employee task: For each message, record its priority, next action, owner, and whether escalation is required. Draft one short acknowledgment.

Suggested trainer debrief

Broken link: Prioritize the near-term deadline and check the authorized location or route to the document owner. Personnel file: Do not share; refer to the approved access process. Agenda template: Provide the approved template in time for the meeting.

End-of-week review rubric

Skill	Observed evidence
Document organization	Uses the approved location and naming convention
Task coordination	Captures owner, due date, priority, and status
Communication	Provides clear updates and asks questions when needed
Judgment	Recognizes confidentiality and approval boundaries

Reflection and next steps

Employee: What feels easiest? What needs another demonstration? What would help you work more confidently next week?

Trainer: Reinforce strengths, agree on one or two practice goals, and schedule a brief follow-up check-in.

PORTFOLIO NOTE / This original simulated example illustrates instructional design, administrative process documentation, onboarding coordination, and supportive learner communication.