

STAFF TRAINING SEQUENCE

Employee Name: _____

Start Date: _____

Mentor/Lead: _____

Department: _____

PHASE 1: ORIENTATION & SETUP

Workspace & Hardware Provisioning Account credentials, hardware setup, and security badge issuance.

Company Culture & Handbook Review mission statement, HR policies, and behavioral expectations.

PHASE 2: TECHNICAL INTEGRATION

Software Stack Walkthrough Primary CRM/ERP training and internal communication tools (Slack/Teams).

Workflow & Standard Operating Procedures Deep dive into specific departmental task cycles and reporting.

PHASE 3: SHADOWING & EXECUTION

Observation Session Shadowing a senior staff member for a full production cycle.

Supervised Task Performance Employee completes core tasks with mentor oversight and feedback.

PHASE 4: FINAL ASSESSMENT

30-Day Performance Review Goal alignment check and identification of further training needs.

I confirm that all above sequence steps have been completed to company standards.

Manager Signature: _____

Date: _____