

# Additional tool: Creating an onboarding game plan

Collaborating to accelerate social impact

# Create an onboarding game plan

- This template accompanies the article [Onboarding: Tips for Transitioning into a Senior Nonprofit Role](#)
- Successfully transitioning into a senior nonprofit management role can be challenging. Having an onboarding game plan for a new hire can help
- Step One:
  - Hiring manager fills out onboarding game plan to the best of her ability
- Step Two:
  - At their first goal-setting meeting, hiring manager and new hire walk through draft game plan and co-create a second draft with significant input from the new hire
- Step Three:
  - Check in on the game plan at the end of each month for the new hire's first 3 months

For more resources, examples, and information visit:  
[www.bridgespan.org/leadershiptoolkit](http://www.bridgespan.org/leadershiptoolkit)

# SAMPLE: Onboarding game plan

## Before official start pre-reading and pre-work

2012 Budget, 2013 Budget, decks from our last strategic planning retreat, research on all of the school districts we operate in, informal lunches with individual team members

## What will success look like in this role:

*After 30 days*

Excellent working knowledge of all districts we work with and projected numbers of how many school partners in each district we will add this year

*After 60 days*

Manage associate to revamp school outreach process and materials

*After 90 days*

X+ new school partners  
A draft 3-year growth plan with cost estimates

### Relationship building

*Top 3 internal relationships to build:*

Executive Director  
Strategy Associate (direct report)  
Development Senior Director

*Top 3 external relationships to build:*

Superintendent of X school district  
Superintendent of Y school district  
Executive Director of Z  
Charter Network

### Culture

*The 2 biggest potential cultural differences:*

We have a data-driven, results-oriented, no excuses culture that can be hard for folks to get used to.

We give a lot of feedback—positive and constructive.

### Mentors – you need 2

*Caring confidante:*

Development Senior Director

*Professional advisor:*

Strategy Director at neighboring region

# Template: Onboarding game plan

## Before official start pre-reading and pre-work

E.g., budgets, strategic planning documents, board books, retreats, company meetings

## What will success look like in this role:

*After 30 days*

*After 60 days*

*After 90 days*

### Relationship building

*Top 3 internal relationships to build:*

*Top 3 external relationships to build:*

### Culture

*The 2 biggest cultural differences between this job and your last:*

### Mentors – you need 2

*Caring confidante:*

*Professional advisor:*