

Familiarization plan

The induction plan contains a recommendation for planning the work content for the first weeks or months. New employees should not be over- or underchallenged. For the individual work tasks, it is determined which person will provide support. The induction plan should contain a factual and temporal structure.

It makes sense that the work tasks follow the following didactic principles:

- From the simple to the complex
- From the general to the particular
- From the known to the unknown

The following sample shows the familiarization plan for the job of clerical support in the secretary's office.

Date of the familiarization plan	01.01.2020
Organizational unit (Dept., LSt., Inst.)	Department XY, Division Z
Executive	Petra Meier
New employee	Maria sample
Position, activity	Processing in the secretariat
Date of start of work/duty	01.01.2020
Date first meeting	02.01.2020
Date feedback meeting after 1 month	03.02.2020
Date feedback meeting after 3 months	02.04.2020
Date Feedback interview Probationary period end	30.06.2020
Planned further training/qualifications	Data protection in secretariats, basics of procurement, training SAP-SRM purchase orders, invoice processing with FIORI, English for the office, event management, writing minutes, travel expense reports and requests, network secretarial management, professional correspondence

Task area 1	Correspondence and appointment coordination (German and English) Language)		
Learning objectives	Independent handling of the secretariat		
Qualifications completed	zhb seminar "English for the office", data protection in secretariats		
Task	Responsible	Done	
Introduction to Outlook			
Introduction to SAP			
Get to know templates of the department			
Get to know the calendar culture of the supervisor			

Task area 2	Planning of meetings/ events		
Learning objectives	Independent execution of meetings and events		
Qualifications completed	Event Management		
Task	Responsible	Done	
Working with the Outlook calendar			
Get to know room allocation on campus			
Know hospitality guidelines			
Know special event forms			
Get to know walk-through regulations			
Clarify decision-making and requirement authorities			

Task area 3	Preparation and accounting of business trips		
Learning objectives	Independent way of working		
Qualifications completed	Travel expense reports and requests		
Task	Responsible	Done	
Learn the basics of business travel regulations			
Cooperation with Department 3.2 (Team 7)			
Introduction to SAP "Travel			
Take care of technical approvals			
Clarify decision-making and requirement authorities			

