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	30.06.2020
period end	
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		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		Done
Working with the Outlook cale	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		Done
Learn the basics of business tr	n 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			

Task area 4	Perform procurement transactions		
Learning objectives	Independent implementation of procurement		
Qualifications completed	Basics of procurement, training SAP-SRM, Invoice processing with FIORI		
Task	involce processing with north	Responsible	Done
Implementation of a procurement process in cooperation with a secretarial colleague			
Introduction to SAP SRM			
Introduction to the FIORI system			
Cooperation with Department 5			
Take care of technical approvals			
Clarify decision-making and requirement authorities			

Task area 5	Writing activities (correspondence, notes, minutes, reports)		
Learning objectives	Independent writing of protocols		
Qualifications completed	Writing minutes, professional correspondence		
Task	Responsible Done		Done
Get to know the templates of	es of the protocols		
Get to know the templates of the endorsements			
Get to know important correspondence partners			
Obtain required materials for protocols			

Task area 6	Mail processing		
Learning objectives	Independent processing of incoming and outgoing mail		
Qualifications completed			
Task		Responsible	Done
Get to know special features of the department			
Get to know postal regulations/working methods			