Personalised Onboarding Plan Template For New Directors

This template is designed to support a tailored, strategic onboarding experience for newly appointed Directors. It is intended to be co-developed with the Chair and Company Secretary and used as a living document during the first months of appointment.

Director Details

- **Name:**
- **Board / Organisation:**
- **Appointment Date:**
- **Term:**
- **Chair:**
- **Company Secretary:**
- **Primary Onboarding Contact:**

Purpose of This Plan

This onboarding plan is designed to:

- Support early, confident, and purposeful contribution at board level
- Align the Director's strengths, experience, and interests with board priorities
- Build strategic context, relationships, and situational awareness
- Clarify expectations, culture, and ways of working

This is not a compliance checklist. It is a strategic roadmap to guide learning, reflection, and contribution.

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1. Personal Reflection: Understanding Your Why

Before formal induction activities begin, take time to reflect on your motivation and purpose.

Your Motivation

- Why have you chosen to become a board director at this point in your career?
- What impact are you seeking to have through governance rather than management?

Reflections:

Why This Board

- What about this organisation's purpose, strategy, or context resonates with you?
- How does this role align with your values and longer-term leadership goals?

Reflections:

2. Self-Assessment: What You Bring and What You Need

Strengths and Experience

- Governance experience (board, committee, chairing roles)
- Executive or senior leadership background
- Functional or technical expertise (e.g. finance, risk, strategy, people, digital, regulation)
- Sector or stakeholder insight

Key strengths you bring:

Development and Context Gaps

- Areas where deeper organisational or sector understanding is required
- Governance or regulatory areas to strengthen
- Cultural or board dynamics to better understand

Priority learning needs:

Perspective and Value

- What unique perspective, lived experience, or way of thinking do you bring?
- Where might this add a fresh lens to board discussions?

Potential value contribution:

3. Board Expectations and Culture

Clarifying Expectations

Discuss early with the Chair or Company Secretary.

- Expectations for preparation and participation
- Balance between listening, questioning, and advocacy
- Expectations around challenge, debate, and dissent

Key takeaways:

Board Culture and Ways of Working

- Decision-making style (consensus, majority, iterative)
- How disagreement is handled
- Behaviours most valued at the board table
- Where influence tends to come from

Cultural observations:

4. Strategic Orientation and Situational Awareness

Priority Documents to Review

Focus on documents that provide strategic and governance context.

- Recent board and committee minutes
- Strategic plan and performance indicators
- Financial reports and forward projections
- Governance framework, board charter, delegations
- Risk framework and key policies
- Constitution and core governance documents

Documents reviewed:

Strategic Reading Prompts

As you review materials, reflect on:

- What stands out or raises questions?
- What assumptions appear to underpin strategy or decisions?
- What is not being discussed but may be important?
- Where might a fresh perspective add value?

Insights and questions:

5. Early Value and Contribution Focus

Intended Contribution

- Committees of interest or intended appointment
- Strategic priorities where your expertise may be relevant
- Specific areas where the Chair or board sees early opportunity for contribution

Agreed focus areas:

Early Engagement Opportunities

- Committee observation or participation
- Input on a current strategic issue or challenge
- Informal contributions through questioning or reframing

Planned actions:

6. Key Relationships to Build

Identify and schedule priority connections.

- Chair
- CEO
- Company Secretary

- Committee Chairs
- Fellow Directors
- Key Executives
- Relevant external stakeholders

Meetings planned or completed:

7. Learning Style and Engagement Preferences

- Preferred pace of onboarding
- Learning preferences (reading, discussion, observation, mentoring)
- Preferred feedback style

Notes:

8. Check-Ins, Reflection, and Review

Scheduled Check-Ins

- Initial check-in (4 to 6 weeks):
- Follow-up review (3 months):

Reflection Prompts

Use these questions during check-ins or personal reflection:

- What patterns or themes am I noticing?
- Where is my perspective adding the most value?
- What questions am I ready to ask more confidently?
- Where am I ready to lean in further?

Reflections and adjustments:

9. Ongoing Notes and Insights

Capture observations, questions, and insights as they arise. These often become valuable future contributions.

Notes:

Using This Plan

Revisit and update this plan regularly during your first six months. Use it as a conversation tool with the Chair and Company Secretary, and as a personal guide to ensure your onboarding remains intentional, strategic, and aligned with where you can make the greatest contribution.

This plan marks the starting point of your impact as a Director.