

KNOWLEDGE RETENTION & TRANSFER (KRT) MODEL



Onboarding Experience Survey Template

Purpose: To capture feedback from staff who have recently onboarded about the onboarding process. It is important to understand what went well and what can be improved during onboarding.

To collect responses from staff, we recommend using this template to create an online survey. For an example of a format in Google Forms, see the screenshots below.

- Orientation:** What was the most valuable part of your onboarding orientation and why?
- Orientation:** What do you recommend be adjusted in order to improve the onboarding orientation?
- Onboarding documentation:** What documents would you recommend be available to incoming staff? Select all that apply:

<input type="checkbox"/> Strategic Framework	<input type="checkbox"/> Procurement plans
<input type="checkbox"/> Organization/Office/Team Directory with Pictures	<input type="checkbox"/> Previous portfolio reviews and guidance for upcoming portfolio reviews
<input type="checkbox"/> Handover memo for your position	<input type="checkbox"/> PAD, activities list (names, budget, partner info)
<input type="checkbox"/> Organization-wide and office calendar	<input type="checkbox"/> Other: _____
<input type="checkbox"/> Organizational chart with areas of responsibility for each staff member	
- Onboarding documentation:** What documents did you find most useful during the first 100 days of your new role?
- Handover:** Which questions and information should people discuss during their one-on-one conversations?

6. **Handover:** What do you wish you would have been told by the outgoing staff?
7. **Overall process:** What overall strengths of the onboarding process should be reinforced and continued?
8. **Overall process:** What areas of the onboarding process should be adjusted?
9. **Overall process:** Are there practices you have observed or experienced that should be incorporated into the onboarding process?
10. **Additional Comments:** Anything else you would like to add?

Sample Onboarding Experience Survey - Google Forms

Sample Onboarding Experience Survey

Knowledge Retention and Transfer (KRT) Model

Purpose: To capture feedback from staff who have recently onboarded about the onboarding process. It is important to understand what went well and what can be improved during onboarding.
Updated July 2023

[Sign in to Google](#) to save your progress. [Learn more](#)

1. Orientation: What was the most valuable part of your onboarding orientation and why?

Your answer

2. Orientation: What do you recommend be adjusted in order to improve the onboarding orientation?

Your answer

3. **Onboarding documentation:** What documents would you recommend be available to incoming staff? Select all that apply:

- Strategic Framework
- Organization/Office/Team Directory with Pictures
- Handover memo for your position
- Organization-wide and office calendar
- Organizational chart with areas of responsibility for each staff member
- Procurement plans
- Previous portfolio reviews and guidance for upcoming portfolio reviews
- PAD, activities list (names, budget, partner info)
- Other: _____

4. **Onboarding documentation:** What documents did you find most useful during the first 100 days of your new role?

Your answer _____

5. **Handover:** Which questions and information should people discuss during their one-on-one conversations?

Your answer _____

6. **Handover:** What do you wish you would have been told by the outgoing staff?

Your answer

7. **Overall process:** What overall strengths of the onboarding process should be reinforced and continued?

Your answer

8. **Overall process:** What areas of the onboarding process should be adjusted?

Your answer

9. **Overall process:** Are there practices you have observed or experienced that should be incorporated into the onboarding process?

Your answer

10. **Additional Comments:** Anything else you would like to add?

Your answer

Submit

Clear form