ONBOARDING & TRAINING GUIDE

First Week for a New Office Hire

Harbor & Pine Property Management · 14 staff

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Owner	Office Manager	**Effective**	January 12, 2026
Audience	New hires and their managers	**Review cycle**	Every 12 months

SAMPLE DOCUMENT. Harbor & Pine Property Management is a fictional business. This sample shows the format and depth of a Next Wave Capital Ventures documentation deliverable. Names, systems and details are illustrative.

1. Purpose

This guide gets a new team member productive and secure in their first week. It covers what happens before day one, the accounts they receive, the security habits we expect, and who to ask for help. Managers use the checklists; new hires keep the "What you need to know" pages.

Best practices this guide follows

Each step lines up with widely used security guidance for small businesses:

- **Least privilege and role-based access** (CIS Controls v8, Controls 5 and 6): new hires get only the access their role needs, granted through groups, approved by their manager, and recorded.
- **Strong sign-in** (NIST SP 800-63B, CISA guidance): long passphrases, no forced periodic password changes, a password manager, and multi-factor authentication (MFA) on every account from day one.
- **Security awareness training** (CIS Control 14): training in week one, before full access to client data, then every year.
- **Documented acknowledgment:** signed acceptable-use and confidentiality policies before access is granted.

2. Before day one (manager + IT, T−5 business days)

#	Step	Owner	Done
1	Submit a new-hire access request: name, role, start date, manager. Access follows the role template, not a copy of another person's account.	Manager	☐
2	Create the Microsoft 365 account and add it to the role's groups (e.g., "Leasing Staff"). No admin rights.	IT	☐
3	Prepare a laptop: enrolled in device management, disk encryption on, updates current, standard (non-admin) user.	IT	☐
4	Create the property-management software account at the role's permission level.	Office Manager	☐
5	Schedule day-one sign-in with IT, and the week-one training session.	Office Manager	☐
6	Send the new hire a welcome email (personal address): start time, parking, who to ask for. No passwords in email.	Manager	☐

3. Day one

#	Step	Owner	Done
1	Sign policies: acceptable use, confidentiality, and the security basics in section 5. File the signed copies.	Office Manager	☐
2	With IT present, the new hire sets their own passphrase (at least 15 characters) on a temporary sign-in link.	IT + New hire	☐
3	Set up MFA with the Microsoft Authenticator app. Register a second method (phone number) as a backup.	IT + New hire	☐
4	Install the company password manager. Save the work account there. Never reuse a personal password.	IT + New hire	☐
5	Tour of shared folders: where client files live, what not to store on the desktop or personal drives.	Manager	☐
6	Confirm email, Teams and the property-management system all open without errors.	New hire	☐

4. Days two to five

Day	Focus
Day 2	Shadow a colleague through the leasing workflow. Practice in the training property, not live records.
Day 3	Security awareness training (45 minutes): phishing, payment-change scams, safe file sharing, reporting.
Day 4	Handle real tasks with a colleague reviewing. Learn how to request access you don't have yet.
Day 5	Check-in with manager: questions, access gaps, anything that felt unclear. Update this guide if needed.

5. What you need to know (new hire)

Security basics

- Use your passphrase only for work. The password manager remembers everything else.
- Approve an MFA prompt only when you are signing in yourself. An unexpected prompt means someone else has your password: deny it and tell IT the same day.
- Never change bank or payment details because of an email or text. Call the person back on a number we already have on file.
- Share client files with links from our shared folders, not as email attachments, and never to personal accounts.
- Lock your screen (Windows key + L) whenever you step away.

Getting help

Need	Who to contact
Can't sign in, lost phone, suspicious email	IT support: help@harborandpine.example (same day)
Need access to a system or folder	Your manager approves, then IT grants it

Need	Who to contact
Policy or HR questions	Office Manager

Report it, don't fix it: if you clicked something suspicious, tell IT right away. Fast reporting matters more than the mistake, and nobody gets in trouble for reporting.

6. 30-day check (manager)

#	Step	Owner	Done
1	Review the new hire's access against the role template. Remove anything extra that was granted "just in case."	Manager + IT	☐
2	Confirm MFA, password manager and device encryption are all active.	IT	☐
3	Record completion of training and signed policies in the personnel file.	Office Manager	☐

When someone leaves, follow OFF-001 (Offboarding): disable sign-in the same day, transfer files, recover devices and remove access from every system.

7. Revision history

Version	Date	Change
1.0	Jun 2, 2025	First version.
2.0	Jan 12, 2026	Rebuilt around role templates, MFA on day one and the 30-day access check.