

# EMPLOYEE ROLE ORIENTATION SYSTEM

A structured onboarding framework for small business teams

Prepared by: VantageScribe

April 2026

---

**SAMPLE DELIVERABLE — Portfolio Work Product**

---

## FACILITATION GUIDE

---

This orientation system is designed to create consistent, effective role onboarding across your team. These orientations are most effective when facilitated internally — reinforcing team ownership, culture, and accountability from day one.

### WHO SHOULD FACILITATE

Facilitation is left to the discretion of the business owner or operations lead. The most effective facilitators are typically one of the following:

- The owner or general manager, particularly when they have held or overseen multiple roles. This sets a standard for new hires and establishes clear authority and expectations from the start.
- An experienced senior team member who has held multiple positions and understands how roles connect. This person participates in day-to-day operations but brings credibility without undermining the manager's authority.

*Use caution when using outside facilitators, junior staff, or individuals without sufficient experience in the role being oriented. This reduces effectiveness and can blur organizational hierarchy.*

### PURPOSE

The purpose of these orientations is not only to explain basic job duties, but to ensure each new team member understands their role within the broader operation — and builds a clear working relationship with their direct manager from day one.

### HOW EACH ORIENTATION WORKS

Orientations should occur within the first week of a new hire starting, or immediately following a role change or promotion. Each orientation follows a consistent three-part structure:

- The Overview (5 min): Lay out the role, its key responsibilities, and how it connects to the rest of the team. Establish what success looks like in this position.
- Relationship & Expectations (5 min): Set clear communication expectations. Establish how and when the employee should check in. Collaboratively define a shared vision for their first 30–90 days.
- Goals & Debrief (5–10 min): Establish 2–3 tangible goals for the first month. Allow open questions. Close by thanking the employee and affirming their role in the team's success.

Total time: 15–20 minutes. Brief, structured, and highly effective. By the end, every new hire should understand their role, have a clear set of early goals, and know exactly how to communicate with their manager.

## Operations Coordinator

*A strong Operations Coordinator doesn't just record what happens — they build the systems that keep the business organized, consistent, and able to function long-term.*

### WHY THIS ROLE MATTERS

This is one of the most behind-the-scenes roles on the team. But without it, there is nothing to carry over season to season, year to year. Institutional knowledge, clean records, and working systems all live here.

### CORE RESPONSIBILITIES

- **Record attendance, meetings, key decisions, and operational wins. Document anything that would help the business move forward and serve as a useful reference for the future.**
- **Own the tracking and coordination of employee recognition, milestone awards, and incentive programs.**
- **Coordinate and enforce uniform standards and equipment inventory across the team.**
- **Build templates, trackers, and checklists that can be used consistently across staff and interpreted by anyone — new or experienced. This is the legacy work of the role.**

### WORKING WITH YOUR MANAGER

Communicate regularly — check in proactively with questions and ideas before acting independently. Your manager is there to support you, not to do your job. Bring both problems and proposed solutions when you check in.

### VISION & FIRST GOALS

At the end of your orientation, complete the following with your manager:

Field	Notes
<b>My vision for this role</b>	Write in together during orientation...
<b>Goal #1 (Month 1)</b>	Specific, measurable target...
<b>Goal #2 (Month 2)</b>	Specific, measurable target...
<b>Goal #3 (Month 3)</b>	Specific, measurable target...
<b>First step by next week</b>	One concrete action before next check-in...

## Events & Program Lead

*A strong Events & Program Lead sets the direction for activities and experiences, then empowers others to help plan and execute them.*

---

### WHY THIS ROLE MATTERS

Without this role, there is no consistent programming, no organized event calendar, and no pipeline of experiences that keep customers and team members engaged. You are the engine behind execution.

### CORE RESPONSIBILITIES

- **Every year, lead the planning process. Collect as many ideas as possible from the team and compile them into a forward-looking calendar to be executed month by month.**
- **For every event or initiative, assign at least one team member to own planning and execution. Gauge their experience level — mentor closely when needed, step back when they're ready.**
- **The bigger picture of this role is to develop planning and execution skills across the team. Delegate where possible and be inclusive in doing so.**
- **Attend all key events and work closely with the manager to ensure the program calendar aligns with business goals and team capacity.**

### WORKING WITH YOUR MANAGER

Communicate regularly — bring ideas and questions proactively. Your manager should not have to run events for you, but is always available to guide and support. Check in before making significant commitments on behalf of the business.

### VISION & FIRST GOALS

At the end of your orientation, complete the following with your manager:

Field	Notes
<b>My vision for this role</b>	Write in together during orientation...
<b>Goal #1 (Month 1)</b>	Specific, measurable target...
<b>Goal #2 (Month 2)</b>	Specific, measurable target...
<b>Goal #3 (Month 3)</b>	Specific, measurable target...
<b>First step by next week</b>	One concrete action before next check-in...

## Communications Lead

*A strong Communications Lead is consistent in how information is shared — ensuring the team stays informed, engaged, and connected.*

---

### WHY THIS ROLE MATTERS

If communication breaks down, so does coordination. This role is the connective tissue between leadership decisions and team awareness. You make sure the right people have the right information at the right time.

### CORE RESPONSIBILITIES

- **Own the flow of information across the team. Maintain consistent channels (messaging platforms, notice boards, newsletters) and ensure no one is left out of important updates.**
- **Manage outward-facing communications, including social media, customer-facing announcements, and community updates. Maintain a consistent brand voice.**
- **Build and maintain a rolling calendar of planned communications. Coordinate with the Events & Program Lead to align messaging with the activity schedule.**
- **Establish systems to collect and relay feedback from customers or team members to leadership. You are the listening post for the organization.**

### WORKING WITH YOUR MANAGER

Proactively share drafts and ideas before publishing. Your manager should not be surprised by outgoing communications. Establish a simple approval flow for anything public-facing before your first week is out.

### VISION & FIRST GOALS

At the end of your orientation, complete the following with your manager:

Field	Notes
<b>My vision for this role</b>	Write in together during orientation...
<b>Goal #1 (Month 1)</b>	Specific, measurable target...
<b>Goal #2 (Month 2)</b>	Specific, measurable target...
<b>Goal #3 (Month 3)</b>	Specific, measurable target...
<b>First step by next week</b>	One concrete action before next check-in...