

KEEP YOUR BEST OFFICE PLAYERS

BREAKAWAY OFFICE STAFF ONBOARDING GUIDE



Instructions:

KEEP is the second element of the Breakaway framework designed to find and keep top talent. Use this checklist for each office hire to ensure they're the right fit for the role and your company culture. Print a new list for every hire and track milestones as they're completed. (Some steps require enrollment in the Breakaway 365 coaching program, which provides additional onboarding tools. **Application details are on the third page**)

WEEK 1-2: FOUNDATION BUILDING

KNOWLEDGE

- Complete comprehensive "Agency Handbook" review including company history, vision, and core values
- Begin micro-learning modules on essential software and systems
- Assign experienced staff member as KEEP buddy for knowledge sharing
- Schedule first "Lunch and Learn" session with immediate department

EMPOWERMENT

- Provide access to digital knowledge base and necessary systems
- Establish clear role expectations and decision-making boundaries
- Schedule first "Guiding Genius Spotlight" presentation for Week 4 **(B365 program tool)**
- Begin small project ownership aligned with Guiding Genius

ENGAGEMENT

- Conduct initial Core4 Alignment session to identify Personal Guiding Truths. (Guiding Truths tool is free to use on our website. Core4 alignment is also a free download)
- Complete Guiding Genius Report **(This report, exclusive to Breakaway 365 members, includes four assessments—PRINT, Kolbe, and custom B365 tools—to reveal strengths and optimize performance.)**
- Create personalized 90-day goal plan aligned with organizational objectives
- Begin "Culture Ambassador" orientation, where your Ambassador spends 1 on 1 time with the new team member.

PARTNERSHIP

- Introduction to all department heads and team members
- First KEEPing Communication Process **(B365 program tool)** session with direct supervisor
- Join cross-departmental project team (This could be "Rocks" and/or big projects that are currently in play that you assign them to)
- Create "Partnership Pledge" with supervisor **(B365 program tool)**

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WEEK 3-4: ROLE INTEGRATION

KNOWLEDGE

- Complete initial software training modules
- Shadow key team members in related departments
- Participate in industry-specific training sessions
- Second "Lunch and Learn" focusing on client care standards

EMPOWERMENT

- Present first project progress update
- Begin contributing to team meetings
- Start "Innovation Sandbox" initiative
- Receive first set of independent responsibilities

ENGAGEMENT

- First progress check-in using KEEPing Communication Process (**B365 program tool**)
- Begin documentation of early wins and learning experiences
- Participate in team-building activity
- Review alignment between role and Guiding Genius

PARTNERSHIP

- First peer feedback session
- Participate in cross-department collaboration
- Schedule job shadowing with different departments
- Begin mentoring relationship

WEEK 5-8: SKILL DEVELOPMENT

KNOWLEDGE

- Advanced software and process training
- Industry compliance training completion
- Department-specific best practices review
- Begin contributing to knowledge base

EMPOWERMENT

- Increase project responsibility
- Begin training others on specific tasks
- Develop process improvement suggestions
- Start leading some client interactions

ENGAGEMENT

- Monthly alignment check with supervisor
- Lead a team meeting or presentation
- Participate in culture-building initiative
- Review and adjust 90-day goals

PARTNERSHIP

- Lead cross-departmental meeting
- Participate in company community event
- Begin reverse mentoring with senior staff
- Contribute to team process improvements

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WEEK 9-12: INTEGRATION AND GROWTH

KNOWLEDGE

- Complete all required certifications
- Begin specialized skill development
- Create training content for future team members
- Final competency assessments

EMPOWERMENT

- Take full ownership of assigned projects
- Begin mentoring newer team members
- Propose new initiatives aligned with Guiding Genius
- Develop next quarter's goals

ENGAGEMENT

- Lead KEEPing Communication Process session (**B365 program tool**)
- Final 90-day review and goal setting
- Present achievements and learnings
- Create long-term development plan

PARTNERSHIP

- Lead team-building activity
- Present department improvement suggestions
- Establish ongoing mentoring relationships
- Create long-term partnership goals



If you find these guides helpful, the **Breakaway 365** program offers even more onboarding tools, plus support and insights on how to leverage all assessments to attract, retain, and maximize top talent.

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CLICK THE LINK OR SCAN THE CODE TO APPLY!

[BREAKAWAY365.COM](https://breakaway365.com)

