

Volunteer Onboarding Journey Worksheet

	Outreach & Marketing	Service						Post-Service
Touch Points								
Team Tasks								
Current Volunteer Experience								
Volunteer Actions								
Questions/ Barriers								
Motivations/ Needs								
Emotions								
Gaps								
Future Volunteer Experience								
Possible Improvements								

Volunteer Onboarding Journey Worksheet

Instructions



- 1. Identify your onboarding touch points.** -- Write down the key moments when your organization touches the lives of new volunteers. (Note: First impressions are the most critical, so start there.)
- 2. Include what happens before and after.** -- Consider what occurs prior to service (during your outreach and marketing efforts) and post-service (when volunteers take their next steps, may refer others to you or sign up for a new assignment).
- 3. Next, analyze what the volunteer currently experiences at each step.** -- Take a clear, objective look at each dimension of their experience including what they do, what they want to know, what drives their behavior, what they feel, and what they are missing (see the notes to the right).
- 4. Finally, brainstorm possible improvements that can be made to the service process.** -- Write down those that directly address the volunteer onboarding gaps identified earlier.

Two Important Questions to Ask

- 1. How can you anticipate volunteer needs?**
- 2. How can you provide an exceptional experience at each step of the way?**

Touch Points

What are the key steps in your volunteer onboarding process?

Team Tasks

What are your staff and volunteers doing at each step of the way? Who does the volunteer come into contact with?

Customer Actions

What are volunteers doing at each step of the way? What decisions & actions are they responsible for?

Questions/Barriers

What uncertainties does the volunteer face? Is there language or jargon does the volunteer not understand? What gets in their way?

Motivations/Needs

What will keep volunteers moving through the process? What information, benefits, motions, values, etc. will help them move forward?

Gaps

What's missing right now from the process for the volunteers? For the team?

Possible Improvements

What improvements can be made to the process, the structure, the information to address the gaps and barriers to an exceptional experience?