Windmill Onboarding Process Content Map

TOPIC	
What is the training topic?	**Are you the subject matter expert (SME) or did you select a topic from Source Content?**
New Vendor Orientation	I am the SME.

DEFINED BUSINESS GOAL AND PROBLEM
Define the business that your sample relates to: What type of business is it? What industry is it a part of? What is the name of the business?
The Lakeside Windmill Farm Market, where people can grow their small businesses.
What is the business goal for this training? What does success look like for the company?
Ensure employees are equipped to efficiently and consistently onboard newly approved vendors, reducing administrative strain and improving the vendor's experience.
What is the business problem (gap), that when solved or closed, would help the organization reach the above goal? In other words, WHY is the goal not being met right now?
Lakeside Windmill lacks a standardized process for onboarding newly approved vendors after board approval. This inconsistency leads to delays in setup, frequent administrative follow-up, and confusion among both vendors and employees about onboarding responsibilities.

AUDIENCE
Who are the primary learners (audience) that will be taking the training? Be specific.
They are administrative staff at Lakeside Windmill who are responsible for onboarding newly approved vendors.
What are the basic demographics of your primary learners?
Mature adults both male and female from late 20s to 60s with varying levels of experience in customer service.
What are your learners' prior knowledge/skill level?

Most staff have general administrative experience; however, their knowledge of the onboarding process is largely informal.
What is currently happening with the target audience that needs to change? Before learners take your training, what are they doing, or not doing successfully?
The onboarding process for new vendors is inconsistent and highly dependent on who is working in the office. Some staff provide partial information, skip steps, or rely on verbal explanations. As a result, new vendors often return with questions, delay their setup, or fail to meet expectations. Administrative staff frequently handle repeat questions, leading to inefficiencies and inconsistent experience for vendors.
(Future State) What should the target audience be doing? Once learners complete the training, what should learners be able to do successfully?
After completing the training, staff will be able to follow a standardized onboarding procedure. They will be able to provide vendors with the correct documents and resources, clearly communicate next steps and deadlines, track onboarding progress using the system, and ensure vendors are set up for success before their first day, minimizing confusion and reducing follow-up inquiries.

CONTENT OUTLINE				
ACTIONS NEEDED TO MEET GOAL				
Directions	**Action 1:**	**Action 2:**	**Action 3:**	**Action 4:**
List all of the actions that a learner would need to take for the business goal above to be achieved.	Communicate Key Expectations to the vendor by emailing the vendors a thorough Onboarding Process explaining vendor responsibilities and next steps	Prepare Customize packets and Distribute Onboarding Materials that answer basic questions for vendors and direct vendors to Self-Service Resources	Track Progress and Follow Up as needed using a tracker and checklists to monitor onboarding completion	N/A
Directions	**How Action 1 ties to the business goal:**	**How Action 2 ties to the business goal:**	**How Action 3 ties to the business goal:**	**How Action 4 ties to the business goal:**

| State HOW these actions tie back to the business goal. | Prevents issues on opening day by setting clear expectations and limiting missteps that require administrative follow-up. | Ensures vendors receive consistent and complete information upfront, reducing repeat inquiries and confusion. | Standardized tracking ensures no vendor falls through the cracks, while timely follow-up and escalation help maintain a smooth onboarding process and positive vendor relationships. | |

LEARNING OBJECTIVES				
Directions	**Terminal LO 1:**	**Terminal LO 2:**	**Terminal LO 3:** (optional)	**Terminal LO 4:** (optional)
List all of the terminal learning objectives (LOs) that the learner will need to achieve to meet the business goal. Your sample should have 2-4 terminal LOs. *Each LO should connect with the action that is in the corresponding column above.*	Learners will be able to Include all the necessary onboarding information in their initial communication with the vendor in a timely manner.	Learners will prepare the appropriate materials for onboarding training based on the types of vendors.	Learners will be able to track vendor onboarding progress and follow up.	N/A
Directions	**Are there any enabling LOs that support terminal LO 1?** (optional)	**Are there any enabling LOs that support terminal LO 2?** (optional)	**Are there any enabling LOs that support terminal LO 3?** (optional)	**Are there any enabling LOs that support terminal LO 4?** (optional)
If there is an enabling LO that supports the terminal LO, list those here. Not all terminal LOs	N/A	N/A		

may have a supporting enabling LO. Terminal LOs may stand on their own but enabling LOs should not.				

CONTENT OUTLINE				
Directions	**Subtopic 1:**	**Subtopic 2:**	**Subtopic 3** (Optional):	**Subtopic 4** (Optional):
List the subtopics (categories of chunked content) in a meaningful order. *Each subtopic should connect with the LO and the action that is in the* **corresponding columns** *above.*	Staff will identify board-approved vendors, accessing the necessary information to attach to email, and sending timely onboarding emails using standardized templates.	Staff will be able to prepare for the in-person onboarding by determining vendor type, distribute the correct materials, and provide relevant market guidelines.	Staff will be able to access tools and procedures for tracking vendor onboarding progress and conduct timely follow-ups to ensure vendors are fully onboarded and ready to operate.	
Directions	**Information / details:**	**Information / details**	**Information / details**	**Information / details**
Outline the information that each subtopic will cover. Avoid going beyond the scope of the LOs. Only include info that is needed to achieve the LOs. This section needs some detail, not just a couple of words. *Example: If your content involves 5 steps of a process, you must write out all 5 steps. If it's three characteristics, all three*	How to Identify Board-Approved Vendors ● Accessing the updated vendor approval list in the file: Board Docs> New Vendors> Approved ● Verifying vendor name, approval date, and assigned booth & category.	Determining Vendor Type ● Review the board-approved vendor list to identify the vendor's category (e.g., food vendor/seasonal, artisan/crafter, special) ● Understand the common requirements and	Accessing the Vendor Tracker ● Navigate the shared tracking system Excel file. ● Ensure the most updated version is being used (Spring Season 2025) ● Review the tracker's layout: vendor name, type, assigned staff,	N/A

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characteristics must be named.

*The information should connect with the action, LO's, and subtopic listed in the **corresponding columns** above.*

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Gathering Necessary Attachments for Email
- Locating and attaching vendor-specific materials and which documents should always be included (e.g., orientation guide, tax form, contract, insurance form, permits, maintenance requests)
- Using a checklist to ensure no required documents are missed (e.g., orientation guide, tax form, contract, insurance form, permits, maintenance requests)

Using Standardized Email Templates
- Choosing the correct template based on vendor type (e.g., food, artisan, seasonal)
- Inserting personalized fields (e.g., vendor name, booth number, In-person training date

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differences for each vendor type.
- Match the vendor type with the appropriate onboarding checklist.

Selecting the Correct Onboarding Materials list in the file: Onboarding Docs> New Vendors> Core Documents
- Core documents for all vendors (e.g., welcome letter, orientation guide, FAQ, market map, calendar of events)
- Providing Relevant Market Guidelines specific to vendor type:
For Food Vendors/Seasonal what to include: (List found in the file: Onboarding Docs> New Vendors> Food vendors)
  ○ Local health department regulations and permit instructions

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onboarding status columns.

Understanding Tracker Columns and Status Indicators
- Columns to review:
  ○ Date of initial approval
  ○ Date onboarding email sent.
  ○ Documents received (checkboxes: contract, tax forms, permits, insurance)
  ○ Notes section (for any vendor-specific follow-up or communication)
- Color coding or status labels (e.g., In Progress, Pending Docs, Complete)

Updating the Tracker
- Immediately update the tracker after any interaction or document submission.
- Use clear, consistent entries (e.g., "Received 5/14 – awaiting insurance cert").
- Note attempted follow-ups and

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	and time) Sending the Email Timely ● Best practices for email timing (within 48 hours of board approval) ● Logging email sent, date for follow-up purposes. ● If an email is not sent out within the 48 hours of approval, send it immediately and note it in the file.	○ Electricity Adjustment request form ○ Market refrigeration and food storage policy ○ Policy on sampling and food safety ○ Seasonal produce vendor schedule and rotation info For Artisans/Crafters what to include:(List found in the file: Onboarding Docs> New Vendors> Craft Vendors) ○ Booth display expectations (e.g., signage, pricing, set-up boundaries) ○ Policies regarding product juried items and pricing guidelines For Special or Non-Profit Vendors what to include: (List found in the file: Onboarding Docs> New Vendors> Special vendors) ○ One-day insurance waiver form ○ Temporary booth setup guidance	outcomes in the note's column. Following Up with Vendors ● Identify vendors with incomplete onboarding after 3 business days from initial email. ● Use follow-up email templates. ● Include clear next steps, deadlines, and contact information. ● Set reminders to check status again within 48–72 hours after follow-up. Marking Completion ● Confirm all required documentation has been received and approved. ● Change the vendor status to "Complete" or move them to a "Ready to Launch" tab.	

		○ Guidelines for promotional materials **Assembling and Organizing the Packet** ● Use a checklist to verify that all required items are included before sending. ● Group documents in logical order (e.g., welcome letter, orientation guide, FAQ, market map, calendar of events, vendor specific forms) ● Include a brief message directing the vendor to self-service resources and who to contact for additional help		

ASSESSMENT				
Directions	**Question:**	**Question:**	**Question:**	**Question:**
Write each stem as a performance-based scenario question set in a realistic context.	You're sending an onboarding email to "Jane's Fresh Jams," a newly approved food vendor. You've already selected the correct	You're preparing onboarding materials for a newly approved food vendor. You've identified their vendor type correctly. What	You're reviewing the onboarding tracker and notice that one vendor's status is "In Progress," but it's been	N/A

*The question should connect with the action, LO, and content in the **corresponding columns** above.* *Ask yourself, "Can this assessment question be answered with the content written above in this template?" No matter what content you include when you develop the course later, if there is not enough content provided in this template to answer the question, you will need to expand the content above.*	email template. What must you do before hitting "Send"?	materials should you be sure to include in their onboarding packet?	more than three business days since the initial onboarding email. What should you do next?	
Directions	**Correct Response:**	**Correct Response:**	**Correct Response:**	**Correct Response:**
List the correct response to each question.	A) Personalize the email with vendor-specific details and attach the correct documents.	B) Welcome letter, orientation guide, FAQ, market map, calendar of events, Local health department regulations and permit instructions, Electricity Adjustment request form. Market refrigeration and food storage policy, Policy on sampling and food safety, and Seasonal produce vendor schedule and rotation info	C) Send a follow-up email using the appropriate template	
Directions	**Distractors (Incorrect Responses)**			**Distractors (Incorrect Responses)**

List the distractors for each question. These distractors should be viable responses, based on the content you have included above, and not so unrelated that they are obviously wrong.	B) Send the email as-is since the template covers everything. C) Include only the contract since the rest will be explained later. D) Blind copy the admin team and send the email without attachments.	A) Local health department regulations and permit instructions, Electricity Adjustment request form. Market refrigeration and food storage policy, Policy on sampling and food safety, and Seasonal produce vendor C) Welcome letter, orientation guide, FAQ, market map, calendar of events, Booth display expectations (e.g., signage, pricing, setup boundaries), Policies regarding product juried items and pricing guidelines D) One-day insurance waiver form, Temporary booth setup guidance, Guidelines for promotional materials.	A) Wait another week to see if the vendor responds B) Call the vendor without referencing their onboarding status D) Delete the entry if the vendor hasn't responded	
Directions	**Feedback for incorrect responses (What is the correct answer, and why?)**	**Feedback for incorrect responses (What is the correct answer, and why?)**	**Feedback for incorrect responses (What is the correct answer, and why?)**	**Feedback for incorrect responses (What is the correct answer, and why?)**
Provide clear feedback that explains what the correct answer is, and why it is correct. *Note: You only need **one set of feedback** for all incorrect responses. For example, "That is*	Correct Feedback: That's right! Personalizing the email and attaching the complete onboarding packet ensures clarity	Correct Feedback: That's right! Food vendors need core onboarding documents, plus food-specific items like health permits and	Correct Feedback: Exactly! Following up after three business days using standardized email keeps communication clear and provides the	

incorrect, the correct answer is__because__.”	and consistency. Incorrect Feedback: That's not correct. The correct answer is A because the email must include personalized information and all relevant documents to properly guide the vendor through the onboarding process.	refrigeration policy. Incorrect Feedback: That's not quite right. The correct answer is B because food vendors require both general onboarding documents and specific materials like the health department form and refrigeration policy.	vendor with actionable next steps. Incorrect Feedback: That's incorrect. The best next step is C—a timely follow-up with a clear message helps vendors stay on track and ensures onboarding is completed promptly.	
Directions	**Additional Question:**	**Additional Question:**	**Additional Question:**	**Additional Question:**
*Include additional performance-based scenario questions here. Note: You need to have a **minimum of four** questions, so a couple of your LOs may have more than one question. Please fill in the additional questions in the appropriate column under the corresponding LO. **It is ok if some boxes are left blank in this section**, as long as you have at least four total questions.*		A vendor reaches out saying they're unsure where to find information on booth display expectations. You realize you sent a generic onboarding packet instead of one tailored for artisan vendors. What should you have done during packet prep and what documents do you need to send them to complete the packet?	You've reviewed the tracker and confirmed that all vendor documents have been received and verified. What's your final step to mark onboarding as complete?	N/A

Directions	Correct Response:	**Correct Response:**	Correct Response:	**Correct Response:**
If you have an additional question for this LO, list the correct response to each question.		B) Verified vendor category and selected relevant materials like booth display expectations, policies regarding product juried items and pricing guidelines	C) Change the status to "Complete" or move them to the "Ready to Launch" tab	
Directions	Distractors (Incorrect Responses)	**Distractors (Incorrect Responses)**	Distractors (Incorrect Responses)	**Distractors (Incorrect Responses)**
If you have an additional question for this LO, list the distractors for each question.		A) Provide all the documents for all the types of venders to save you time C) Included only the FAQ document so they could look up their questions D) Directed the vendor to ask questions during their first market day to save them the trip back to the market.	A) Delete their row from the tracker B) Send them a congratulatory email D) Highlight their name in yellow to show readiness	
Directions	Feedback for incorrect responses (What is the correct answer, and why?)	**Feedback for incorrect responses (What is the correct answer, and why?)**	**Feedback for incorrect responses (What is the correct answer, and why?)**	**Feedback for incorrect responses (What is the correct answer, and why?)**
If you have an additional question for this LO, provide clear feedback that explains what the correct answer is and why.		Correct Feedback: That's correct! Using a checklist, structuring the packet logically, and including access to	Correct Feedback: That's correct! Updating their status in the tracker makes it clear they're fully	

		self-service resources supports a smooth onboarding process. Incorrect Feedback: Not quite. The correct answer is C because well-organized packets and links to resources empower vendors to succeed with less administrative follow-up.	onboarded and ready to begin. Incorrect Feedback: That's not quite right. The correct answer is C—finalizing their tracker status ensures clarity for everyone managing the onboarding pipeline.	