

Consultant Onboarding Survey Template

All questions are optional. Follow each question's directions.

Write your answers to the open questions in the space provided.

Name one consulting project, one checkpoint, and one next milestone so every respondent reviews the same setup. All seven questions are optional and always visible.

1. How clear are the project outcomes you are expected to support?

- ☐ Not at all clear
- ☐ Slightly clear
- ☐ Moderately clear
- ☐ Very clear
- ☐ Extremely clear
- ☐ Outcomes have not been discussed

2. Do you have access to the systems, files, and people needed for your first agreed deliverable?

- ☐ Yes, all needed access
- ☐ Mostly
- ☐ Partly
- ☐ No
- ☐ Not sure yet

3. How clear is who can make day-to-day project decisions?

- ☐ Not at all clear
- ☐ Slightly clear
- ☐ Moderately clear
- ☐ Very clear
- ☐ Extremely clear
- ☐ Decision authority has not been discussed

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4. Which onboarding area needs attention first?

- ☐ Scope and deliverables
- ☐ System or file access
- ☐ Background information
- ☐ Decision authority
- ☐ Communication cadence
- ☐ Team handoffs
- ☐ Another area
- ☐ No change needed

5. How well does the agreed communication cadence fit the project work?

- ☐ Not at all well
- ☐ Slightly well
- ☐ Moderately well
- ☐ Very well
- ☐ Extremely well
- ☐ No cadence has been agreed

6. What project dependency or constraint should the team address before the next milestone?

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7. What would be the most useful next step?

- ☐ Fix access
- ☐ Clarify scope
- ☐ Introduce a decision-maker
- ☐ Share background information
- ☐ Confirm the communication cadence
- ☐ Confirm the next milestone
- ☐ Another step
- ☐ No action needed