

# Role Transition & Onboarding Guide

A working guide for the incoming coordinator and the supervisor responsible for the handoff.

|                                           |                                         |                                 |                                     |
|-------------------------------------------|-----------------------------------------|---------------------------------|-------------------------------------|
| OWNER<br><b>Operations Manager</b>        | VERSION<br><b>1.0</b>                   | EFFECTIVE<br><b>August 2026</b> | REVIEW<br><b>November 2026</b>      |
| APPLIES TO<br><b>Incoming coordinator</b> | SUPERVISOR<br><b>Operations Manager</b> | WINDOW<br><b>First 30 days</b>  | STATUS<br><b>Sample / fictional</b> |

## PURPOSE

Preserve the recurring work, decision rules, source records, relationships, and judgment that make this role function — then give a new employee a clear path from observation to independent performance.

## HOW TO USE THIS GUIDE

### IF YOU ARE THE NEW COORDINATOR

Use this guide to understand the shape of the role, find the right source when you need it, and know what you should be able to do at each stage. You are not expected to memorize the guide.

### IF YOU ARE THE SUPERVISOR

Use live work whenever practical. Demonstrate first, then let the employee perform. Move to independence only when the work itself shows readiness — not because a date arrived.

**WHO CONFIRMS READINESS** The departing coordinator is a source during capture and demonstrates work during the planned four-week overlap. The supervisor confirms readiness, because the handoff has to work after the departing employee's last day.

### A USEFUL BOUNDARY

This guide organizes the role. It does not replace technical procedures, safety requirements, or manager decisions. When a source conflicts with the real situation, treat the conflict as something to resolve — not something to smooth over from memory.

### WHEN THE SOURCE DOES NOT EXIST YET

This guide names the sources the role depends on: routing table, priority rules, approval map, report templates, contact map. Where one of those is missing, informal, or out of date, treat it as a finding rather than an oversight. Identifying and building it is part of the transition work — not a prerequisite for beginning it.

### KEEPING THIS CURRENT

The Owner named above maintains this guide. Lessons captured under Judgment + Exceptions, and updates flagged during the quarterly review, are folded in at the Review date — or sooner when the change affects daily work. A guide no one owns becomes one more thing the next person has to work around.

## THE ROLE IN ONE PAGE

# Keep the work moving — and keep exceptions from disappearing.

The Operations Support Coordinator is the connective role between incoming requests, field work, current records, recurring reports, purchasing, and the people responsible for each.

## THE SIX OUTCOMES THIS ROLE OWNS

- **Requests are complete.** New customer and internal requests have the information needed for the next person to act.
- **Work is routed correctly.** Standard work reaches the correct queue; unusual work reaches the correct decision-maker.
- **Status stays current.** The work-order record reflects what is actually known — not what someone assumes happened.
- **Recurring reports arrive on time.** Weekly and monthly summaries use current source data and call out unresolved exceptions.
- **People get a next step.** Customers and internal partners know what happens next, even when the answer is “we need to verify this.”
- **Judgment is visible.** When something does not fit the normal path, the coordinator records the issue and escalates it with enough context to act.

## WHO DEPENDS ON THIS ROLE

|                                                                                            |                                                                                                        |
|--------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------|
| <b>CUSTOMER SERVICE</b><br>Needs clear routing, current status, and realistic next steps.  | <b>FIELD SUPERVISOR</b><br>Needs a clean next-day work list and exceptions identified before dispatch. |
| <b>FINANCE</b><br>Needs complete purchasing information and recurring reports on schedule. | <b>OPERATIONS MANAGER</b><br>Needs unresolved issues surfaced early — not discovered after a deadline. |

## THE STANDARD

Success means knowing what you can handle, where the current source lives, and when the work needs someone else's decision.

## ONBOARDING PATH

# Observe it. Do it with guidance. Then own the normal work.

The calendar gives structure, but time alone does not create readiness. Each phase ends when the employee can show the next level of performance in real work. Day numbers refer to scheduled workdays, not calendar days; Day 30 is the employee's 30th scheduled workday. Milestones are cumulative checks, not single-day assignments.

|                                                                                                                                                                                                                                                         |                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                         |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>1 OBSERVE</b><br><b>Days 1–5</b><br>See the full flow. Learn where the sources live. Watch standard requests from intake through handoff.<br><b>READY WHEN:</b> You can explain the sequence and find the right resource without being walked to it. | <b>2 GUIDED</b><br><b>Days 6–15</b><br>Handle standard work while the supervisor reviews before it moves forward. Practice exceptions deliberately.<br><b>READY WHEN:</b> Your work is correct without step-by-step prompting and you flag uncertainty instead of guessing. | <b>3 INDEPENDENT</b><br><b>Days 16–30</b><br>Own normal daily work. Supervisor reviews the usual outputs and remains available for exceptions.<br><b>READY WHEN:</b> You can manage the normal flow, meet recurring deadlines, and escalate the work that does not fit. |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

## MILESTONES

|               |                             |                                                                                                                                     |
|---------------|-----------------------------|-------------------------------------------------------------------------------------------------------------------------------------|
| <b>DAY 5</b>  | <b>Find + explain</b>       | Locate the primary systems/resources and describe how a standard request moves through the role.                                    |
| <b>DAY 10</b> | <b>Route</b>                | Complete and route standard requests using the guide, with review before release.                                                   |
| <b>DAY 15</b> | <b>Report</b>               | Prepare the weekly open-work report from current source data, with normal supervisor review.                                        |
| <b>DAY 20</b> | <b>Coordinate</b>           | Build the next-day field list, surface conflicts, and complete the handoff without step-by-step prompts.                            |
| <b>DAY 25</b> | <b>Recognize + escalate</b> | Handle a request that does not fit the guide: preserve the facts, identify the correct decision-maker, and document the escalation. |
| <b>DAY 30</b> | <b>Own the normal flow</b>  | Manage routine work independently and escalate exceptions with the facts needed for a decision.                                     |

# Week 1: see the whole system before owning a piece of it.

The first week is a guided walk through the work: where requests begin, what changes hands, which source matters, and what happens when the normal path breaks.

## BEFORE DAY 1

Supervisor prepares: system accounts and permissions; shared-drive and current-template access; overlap/shadowing time; live work appropriate for guided practice; and a backup person for questions when the departing coordinator is unavailable.

| DAY | FOCUS                       | EMPLOYEE DOES                                                                                                                                  | SUPERVISOR CONFIRMS                                                                                |
|-----|-----------------------------|------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------|
| 1   | <b>Role + sources</b>       | Follow one request from intake to completion. Locate the work-order queue, routing table, report templates, contact map, and current calendar. | Employee can find each source again without being led to it.                                       |
| 2   | <b>Request intake</b>       | Shadow several standard requests. Complete two practice entries from provided scenarios.                                                       | Required information is captured; unknown information is left unknown, not filled from assumption. |
| 3   | <b>Routing + status</b>     | Route supervised live requests. Compare work-order status with supervisor/field notes.                                                         | Employee uses the current source and recognizes when two records disagree.                         |
| 4   | <b>Field handoff</b>        | Watch the next-day list get built. Draft a parallel version and compare decisions.                                                             | Due work is included; unclear priority or status is flagged before handoff.                        |
| 5   | <b>Reports + exceptions</b> | Walk through the weekly report. Practice one missing-information case and one conflicting-record case.                                         | Employee knows what to stop, what to ask, and who owns the next decision.                          |

## COACH THE WORK, NOT THE BINDER

Use real examples whenever practical. Explain the decision, then let the employee make the next one. If the supervisor has to rescue every step, the employee has not yet had a chance to learn the sequence.

# The employee is ready when the work shows it.

These are the major performance checkpoints for the first month. Each states what the employee must do, the resources available, and the standard that separates “still learning” from “ready for normal work.”

## 1 ROUTE A STANDARD REQUEST DAY 10

Using the work-order system, routing table, and current customer/request information, complete and route a standard request without step-by-step supervisor direction.

**READY WHEN** required fields are complete, the correct category/queue is used, unknown information is not guessed, and the record tells the next person what happens next.

## 2 PREPARE THE WEEKLY OPEN-WORK REPORT DAY 15

Using the current system export and approved template, prepare and route the weekly report without copying totals from a prior report.

**READY WHEN** required sections are complete, aged/unresolved work is called out, the report agrees with the current source data, and it reaches the established distribution on time.

## 3 BUILD THE NEXT-DAY FIELD LIST DAY 20

Using the open work queue, current status notes, and the supervisor’s priority rules, prepare the next-day list for review before the daily handoff.

**READY WHEN** due work is included, completed/canceled work is removed, conflicts are flagged, and unresolved priority questions are surfaced before the list is released.

## 4 HANDLE AN EXCEPTION WITHOUT GUESSING DAY 25

Given an incomplete request, conflicting record, or situation outside the routing guide, pause normal processing and identify the correct next decision-maker.

**READY WHEN** the issue is described clearly, known facts are preserved, the correct person is contacted, the escalation is documented, and no unsupported promise or record change is made.

*Notice what is not measured: confidence, time spent in training, or whether every page was read.*

## WHAT HAPPENS WHEN

# The calendar experienced people carry in their heads.

A new employee needs more than a task list. They need to know what repeats, what has a deadline, and which work should already be visible before someone has to ask for it.

| RHYTHM             | WHEN                                                    | WHAT GOOD LOOKS LIKE                                                                                                                                                        |
|--------------------|---------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| DAILY              | Start of day / mid-day / before handoff                 | Review new and overnight requests; keep status current; build the next-day field list after the major same-day updates; surface anything that cannot be cleanly handed off. |
| WEEKLY             | Monday report / midweek aged-work review / Friday close | Publish the open-work report; identify work that is aging without a clear next step; clear incomplete notes before the week closes.                                         |
| MONTHLY            | First half of month                                     | Close the prior month's operations summary, route purchasing support, review recurring contractor/record items, and confirm the next month's scheduled obligations.         |
| QUARTERLY / ANNUAL | Scheduled review points                                 | Archive superseded templates, verify contact/approval lists, review recurring calendar items, and flag role-guide updates while the knowledge is current.                   |

## THE DAILY HANDOFF

- **Before the list moves forward:** remove work that is complete or canceled; verify anything marked "pending"; flag work with unclear ownership or priority.
- **At handoff:** the supervisor should be able to see what is planned, what is uncertain, and what decision is needed without reconstructing the day.
- **After handoff:** new changes belong in the current work-order record, not in a private note that disappears overnight.

### WHY THIS PAGE EXISTS

The operating rhythm turns "I usually remember to..." into work the organization can see, teach, and review.

## START WITH THE TRIGGER

# When this happens, where does the work go?

The coordinator does not need a separate procedure memorized for every situation. The first question is simpler: what triggered the work, and which source governs the next action?

| TRIGGER                               | START HERE                                 | NEXT ACTION                                                                                          | ESCALATE WHEN                                                                                |
|---------------------------------------|--------------------------------------------|------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|
| <b>New service / internal request</b> | Intake routing table + work-order system   | Complete required facts, select the normal route, and leave a note that makes the next step visible. | Safety concern, unclear ownership, missing required fact, or no matching route.              |
| <b>Field status changes</b>           | Current work order + supervisor/field note | Update the current status and any required follow-up.                                                | Two sources disagree or the change would alter a technical/location record.                  |
| <b>Next-day list requested</b>        | Open work queue + priority rules           | Build the draft list, remove closed work, and flag conflicts before handoff.                         | Priority is unclear, capacity is exceeded, or promised timing conflicts with current status. |
| <b>Purchase / invoice support</b>     | Purchasing tracker + approval map          | Verify request, owner, coding information, and approval before routing.                              | Required approval is missing or the work does not match the normal category.                 |
| <b>Weekly / monthly report due</b>    | Current export + approved template         | Refresh from source, review exceptions, complete required narrative, route on schedule.              | Source totals do not reconcile or an unresolved item changes the report meaningfully.        |
| <b>Record conflict discovered</b>     | Preserve both sources                      | Stop the update, capture the conflict, and send it to the owner of the authoritative record.         | Always — the coordinator does not resolve a technical record conflict from memory.           |

# Most errors do not start with “I ignored the procedure.”

They start when a situation almost fits the normal path — and someone quietly decides what the missing piece probably means. This page gives the coordinator a safer way to handle uncertainty.

|                 |                                                                                                                                                   |                                                                                                                                                        |
|-----------------|---------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------|
| NORMAL          | The request is complete. The route is clear. The current record agrees with the situation.                                                        | Proceed using the normal process. Document the status and next step.                                                                                   |
| KNOWN EXCEPTION | The issue is familiar, but one required fact, approval, or owner is missing.                                                                      | Pause. Get the missing piece from the listed source or owner. Then resume the normal process.                                                          |
| STOP + ESCALATE | There is a safety concern, a possible service interruption, a conflicting technical/location record, or a commitment outside confirmed authority. | Do not guess, edit around the conflict, or make a promise. Capture the facts and contact the listed decision-maker.                                    |
| UNKNOWN         | The situation is genuinely new or does not match the guide.                                                                                       | Describe what happened, preserve the current information, and ask who owns the decision. Add the lesson to the role guide after the issue is resolved. |

## USE THESE WORDS WHEN YOU DO NOT KNOW YET

|                 |                                                                                                                                 |
|-----------------|---------------------------------------------------------------------------------------------------------------------------------|
| TO A CUSTOMER   | <i>“I can see the request. I need to verify the current status before I give you a time. Here is what I can confirm now...”</i> |
| TO A COWORKER   | <i>“These two records do not agree. I have not changed either one. Here is what each currently says...”</i>                     |
| TO A SUPERVISOR | <i>“This does not match the normal route. Here are the facts I have, the part I cannot confirm, and the decision I need.”</i>   |

# The new person needs to know who owns what.

Use this page when the work reaches the edge of the coordinator role. Bring the record number, the known facts, and the specific question whenever possible.

| NEED                                 | FIRST STOP            | BACKUP                           | BRING WITH YOU                                                                     |
|--------------------------------------|-----------------------|----------------------------------|------------------------------------------------------------------------------------|
| Field schedule / capacity            | Field Supervisor      | Operations Manager               | Work-order numbers, requested timing, known constraints                            |
| Customer account / billing status    | Customer Service Lead | Finance Coordinator              | Account / request number and the exact status question                             |
| Purchase / invoice routing           | Finance Coordinator   | Operations Manager               | Vendor, request owner, purchase reference, missing approval                        |
| Technical / location record conflict | Field Supervisor      | Engineering / Operations Manager | Record IDs or screenshots; what each source currently says                         |
| After-hours urgent concern           | Duty Supervisor       | Operations Manager               | Location, caller/contact, observed issue, current work-order status — no diagnosis |

**CONTACT MAP** — The ownership table on this page is the role's contact map. A client version includes current names, direct contact information, and after-hours details where appropriate.

## PRIMARY SOURCES

- **WORK-ORDER SYSTEM** - Current request, owner, status, and operational notes. This is the coordinator's primary record of work in motion.
- **ROUTING TABLE** - Approved path for standard request types and the owner for each normal branch.
- **SHARED DRIVE** - Current report templates, role guide, calendars, approval maps, and controlled reference documents.
- **GIS / LOCATION VIEWER** - Reference location information. The coordinator may view it, but does not "correct" conflicting technical/location records from memory.
- **PURCHASING TRACKER** - Current routing and approval status for purchase support.

## ONE EXCEPTION, END TO END

## What pages 04 through 08 look like on a Tuesday.

A customer calls about a service request submitted last week. The work order shows Pending. The note says only “waiting.” The customer says a crew was at the address Friday and told her the line runs somewhere other than where the map shows it.

**WHAT THE COORDINATOR NOTICED**

Three problems inside one phone call: a pending status with no stated owner, a possible completed visit that is not in the record, and a reported conflict with the location record.

**WHAT THE COORDINATOR DID NOT DO**

Did not update the status to match what the customer described.  
Did not change the location record. Did not give a completion date.

**WHAT THE CUSTOMER HEARD**

*“I can see your request, and I can see a crew was scheduled. What the record doesn’t show yet is what happened Friday, and I’m not going to guess at it. I’m sending this to our field supervisor today. You’ll get a confirmed status — not an estimate — by tomorrow afternoon.”*

**WHAT WENT TO THE FIELD SUPERVISOR**

WO-4471. Status shows Pending; note says “waiting” with no owner. Customer reports a crew on site Friday 8/7 and states the line location differs from the GIS view at 1420 Ridge Fork. I have not changed the work order or the location record. Need the actual Friday disposition, and a decision on whether the location discrepancy goes to Engineering. Customer expects a status call by Wednesday afternoon.

**WHAT CHANGED AFTERWARD**

The crew had finished the work and the disposition was never entered. The location the customer described turned out to match the record — she had been looking at a neighboring easement. Preserving both sources cost twenty minutes and confirmed the record; guessing would have corrupted it. Two lessons went into the guide: “waiting” is not an acceptable pending note — the note must name what the order is waiting on and who owns it; and a customer-reported location conflict routes to the Field Supervisor for confirmation, never to a record edit.

**WHY THIS PAGE IS HERE**

No procedure covered this call, and the coordinator did not need one. They needed to know what to preserve, what not to promise, who owned the decision, and what to write down so the next person is not solving it a second time.

## WHAT USED TO LIVE IN ONE PERSON'S HEAD

# The small things that make the role work.

Useful knowledge transfer identifies what changes the next person's action — then places that knowledge where it will be needed.

| EXPERIENCED EMPLOYEE SAID                                                                 | WHAT IT REALLY MEANS                                                                                                             | WHERE IT NOW LIVES                                         |
|-------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------|
| <i>"The Monday report is easy. Just use last week's and refresh the numbers."</i>         | The template is reusable; the data is not. Every report must start from a fresh current export.                                  | <b>Weekly report objective + operating rhythm</b>          |
| <i>"I usually build tomorrow's field list after lunch."</i>                               | Build it late enough to include major same-day changes, but early enough for the supervisor to resolve conflicts before handoff. | <b>Daily handoff + milestone</b>                           |
| <i>"If an order says pending, check the note. Pending can mean two different things."</i> | A pending order is not actionable until the note says what it is waiting on — customer, crew, approval, or other owner.          | <b>Core work map + status standard + worked example</b>    |
| <i>"I told her we'd be out Thursday."</i>                                                 | The coordinator can explain the next step, but completion timing belongs to the confirmed field schedule.                        | <b>Role boundary + exception language + worked example</b> |
| <i>"Don't change the location record just because a caller says the map is wrong."</i>    | A caller description does not authorize a technical/location record change. Conflicts are preserved and escalated.               | <b>Stop + escalate rule + worked example</b>               |
| <i>"Finance needs the purchasing sheet before they start chasing us."</i>                 | The recurring purchasing support has an owner, a schedule, required information, and a visible backup path.                      | <b>Operating rhythm + people map</b>                       |
| <i>"If you're not sure who owns something, ask me."</i>                                   | The role needs an ownership map that survives the person, not a single point of contact.                                         | <b>People + Sources page</b>                               |

## CAPTURE RULE

Do not preserve a habit simply because "that is how we have always done it." Preserve the purpose, the decision, the source, and the useful exception. If a habit cannot be explained or validated, flag it for review instead of turning it into policy.

# Thirty days is a target window — not automatic certification.

Mark the highest level the employee has demonstrated in normal work. “Independent” means the employee can perform without step-by-step prompting; normal review and access to a supervisor still apply. Use the standard shown for each row, then record the evidence used for sign-off below.

| PERFORMANCE AREA                     | OBSERVED                 | GUIDED                   | INDEPENDENT              | STANDARD                                                                               |
|--------------------------------------|--------------------------|--------------------------|--------------------------|----------------------------------------------------------------------------------------|
| Route a standard request             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Required facts complete; correct route; no guessed information.                        |
| Prepare the weekly report            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Fresh source data; required sections complete; exceptions visible; routed on schedule. |
| Build the next-day field list        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Due work included; status current; conflicts surfaced before handoff.                  |
| Handle incomplete / conflicting work | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Stops normal processing, preserves facts, escalates to correct owner.                  |
| Find the right source / owner        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Uses the current resource to frame a specific question with the relevant record.       |
| Close the daily handoff              | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Leaves current status and next actions visible to the next person / shift.             |

Rows five and six are not separate objectives. Finding the right source traces to the Day 5 milestone; closing the daily handoff traces to the operating rhythm. Both are listed here because their absence shows up inside every other area on this page.

## EVIDENCE / NOTES

Record examples, work-order or report references, support still needed, or the evidence used for sign-off.

## IF AN AREA IS STILL OBSERVED OR GUIDED AT DAY 30

This happens, and it is not a failed onboarding. Name the specific gap — a missing practice opportunity, missing system access, or a decision rule that was never stated out loud — assign what closes it, and set the next check date below. Do not mark Independent to keep the calendar.

## CLOSEOUT CONVERSATION

- **What can you now handle without help?** Name the work, not a confidence level.
- **What still slows you down?** Identify the missing practice, source, access, or decision rule.
- **What surprised you about the role?** New hires often expose assumptions the old process stopped noticing.
- **What should be added or corrected in this guide?** Update while the first-month experience is still fresh.

Employee: \_\_\_\_\_

Date: \_\_\_\_\_

Supervisor: \_\_\_\_\_

Next review / support check: \_\_\_\_\_