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WAREHOUSE MANAGEMENT | WORKFORCE SOLUTIONS

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Document Title:	SOP: Shadowing Program After Bootcamp Training	Creation Date:	4-May-2026
		Effective Date:	18-May- 2026

1. Purpose

To provide newly trained employees with practical exposure to actual work processes by introducing them to daily tasks, tools, and workflows through a structured shadowing program.

2. Scope

This SOP applies to all internal employees who have completed the 5-day bootcamp training.

3. Bootcamp Overview

- Day 1–2: Company Culture & Policy, Core system tools, Roles and Responsibilities Discussion
- Day 3–5: Shadowing with assigned Buddy/Mentor

4. Shadowing Objectives

By the end of the 3-day shadowing, the trainee should:

- Be introduced to all key daily tasks and responsibilities.
- Understand the overall workflow and routine.
- Gain awareness of systems, tools, and processes used
- Observe how tasks are performed step-by-step

Note: The goal is exposure and understanding, not full mastery of all tasks.

5. Roles and Responsibilities

Trainee

- Actively observe and take notes
- Ask questions for better understanding
- Participate when given the opportunity
- Be punctual and engaged

Buddy/Mentor

- Introduce all relevant tasks and workflows
- Demonstrate how tasks are performed
- Explain processes clearly and simply
- Guide during and after shadowing

Business Unit or Department Head

- Assign and approve a qualified buddy/mentor.
- Ensure shadowing is properly conducted.
- Monitor trainee progress.

Minimum Standards for Assigned Buddy/Mentor

To ensure consistent and effective shadowing, the assigned Buddy/Mentor must meet the following minimum standards:

1. Must be a regular employee or a confirmed long-term assigned personnel in good standing.
2. Must have sufficient role knowledge, process familiarity, and actual hands-on experience in the function being shadowed.
3. Must have no active disciplinary case or unresolved performance issue that may affect training quality.
4. Must be endorsed by the Business Unit or Department Head as fit to guide a trainee.
5. Must be available during the scheduled shadowing period and able to provide actual task exposure, guidance, and timely responses to trainee questions.
6. Must demonstrate professionalism, clear communication, patience, and willingness to coach the trainee.
7. Must be able to complete the required shadowing documents, checklists, and feedback forms on time.

Additional Guidelines

- One Buddy/Mentor should only handle the number of trainees that can be reasonably supported without affecting operations.
- If the assigned Buddy/Mentor becomes unavailable, the Business Unit or Department Head must immediately assign a qualified replacement.

6. Shadowing Structure (3-5 Days Shadowing Activities)

Day	Activity	Assignee	Duration	Remarks
Day 3 Morning	Site welcome, detailed discussion of tasks & success metrics	Department Head	Half day	Clear understanding of role and expectations
Day 3 Afternoon	Shadowing mentor/buddy	Mentor/Buddy	Half day	Observe workflows, ask clarifying questions
Day 4	Guided Practice (Nesting)	Buddy system Shadowing Checklist https://docs.google.com/spreadsheets/d/1NdXF8xaXgvb3DZ1wm9EqCd2EggE1GPbGLNd_4VvImzg/edit?usp=sharing	Whole day	Hands-on learning with close support
Day 5	Independent Practice with Support	Candidate	Whole day	Apply learning, take the lead with buddy guidance & support

7. Key Learning Areas (on-the-job landed)

The trainee should be introduced to the following:

A. Daily Tasks

- Overview of all regular tasks handled by the role

Shadowing checklist:

New hire checklist to be submitted after a 3-12 day shadowing schedule:

https://www.google.com/url?q=https://docs.google.com/spreadsheets/d/1NdXF8xaXgvb3DZ1wm9EqCd2EggE1GPbGLNd_4VvImzg/edit?usp%3Dsharing&sa=D&source=docs&ust=1776918770391095&usg=AOvVaw1ZGGk7I6PjUdBmtewn-J1h

B. Daily Routine

- Typical workday flow (start to end)

C. Meetings & Communication

- Regular meetings (if applicable)
- Communication channels and processes
- Added the MOM Template with instructions for filling out.

<https://docs.google.com/document/d/1jNPzp1eCquistpYazxjCOTL7GA65rDub/edit?usp=sharing&oid=105956333449196512716&rtpof=true&sd=true>

D. Systems & Tools

- Tools/platforms used
- Purpose and basic navigation

Tool/App	Purpose	Basic Use	Notes
ClickUp	Task management	Create/update tasks, assign owners, track progress	Used daily for accountability
HRIS	Employee records	Log attendance, update profiles, check leave balances	Handle confidential data carefully
Email/Chat (Teams / Chat App)	Communication	Send updates, join meetings, follow etiquette	Use clear subject lines and professional tone
Google Drive (Shared Drive)	File storage & collaboration	Upload docs, organize folders, share files with team, ensure version control	Always save in correct folder; avoid duplicates
Xero	Finance & PBC (Prepared by Client)	Record transactions, manage invoices, reconcile accounts	Used by Finance team for reporting and compliance
WMS (Warehouse Management System)	Warehouse operations	Track inventory, manage stock movement, monitor receiving & dispatch	Critical for warehouse staff to ensure accuracy
KB Portal (Knowledge Base Portal)	Centralized knowledge & references	Access company policies, guides, FAQs, and process documents	First stop for staff when looking for answers

E. Work Process Overview

- General step-by-step flow of tasks
- Expected outputs

8. Post-Shadowing Support (Critical Phase)

After the 3-day shadowing:

- The trainee will transition to actual task execution
- The Buddy/Mentor must continue to guide for 1–2 weeks

Support Includes:

- Answering questions
- Providing clarifications
- Reviewing work outputs
- Assisting with issues or blockers

This phase ensures a smoother transition from observation to independent work.

Support Activity	Description	Mentor/Buddy Notes	Trainee Feedback	Completion (✓)
Answering Questions	Responding to trainee's queries during tasks	[Mentor writes notes here]	[Trainee writes feedback here]	<input type="checkbox"/>
Providing Clarifications	Explaining unclear processes or steps	[Mentor notes clarifications given]	[Trainee confirms understanding]	<input type="checkbox"/>
Reviewing Work Outputs	Checking trainee's work for accuracy and completeness	[Mentor notes corrections or approvals]	[Trainee reflects on improvements]	<input type="checkbox"/>
Assisting with Issues/Blockers	Helping resolve problems or access issues	[Mentor notes assistance provided]	[Trainee confirms resolution]	<input type="checkbox"/>

9. Completion Criteria

The shadowing phase is considered successful when:

- All key tasks and workflows have been introduced
- The trainee shows a basic understanding of processes
- A trainee can start tasks with guidance

✓ Trainee Shadowing Completion Checklist

Trainee Name: _____

Department: _____

Mentor/Buddy: _____

Date of Shadowing Completion: _____

Completion Criteria

The shadowing phase is considered successful when the following are met:

Criteria	Details	Mentor/Buddy Confirmation (✓)	Comments
Key tasks and workflows introduced	Trainee has been shown all major tasks and processes relevant to the role.	<input type="checkbox"/>	_____
Basic understanding of processes	Trainee demonstrates initial comprehension of workflows and procedures.	<input type="checkbox"/>	_____
Ability to start tasks with guidance	Trainee can begin performing tasks with mentor/buddy support.	<input type="checkbox"/>	_____

- Mentor/Buddy /BUH - send evaluation after 2nd week of shadowing.
<https://forms.clickup.com/25781067/f/rjrub-44978/NTX3ZETDBSGSRXPSN1>
- Newly hired Trainee fills out the check-in feedback Survey for 3 intervals to identify gaps and address task and training issues after shadowing.
<https://forms.clickup.com/25781067/f/rjrub-51718/9X7TYVF0C81HH3D7AX>



Trainee Check-In Feedback Monitoring

Interval	Trainee Feedback	Training Evaluation	Follow-Up Action (✓)
Week 2 (After Shadowing)	<ul style="list-style-type: none">- Confidence level in tasks- Challenges faced- Support needed- Suggestions for improvement	<ul style="list-style-type: none">- Notes on trainee's progress- Clarifications provided- Additional support planned	<input type="checkbox"/>
Month 2	<ul style="list-style-type: none">- Progress since last check-in- Comfort level with tools/systems- Remaining training gaps- Feedback on mentor support	<ul style="list-style-type: none">- Observations on growth- Training adjustments- System/tool refresher plans	<input type="checkbox"/>
Month 3	<ul style="list-style-type: none">- Overall confidence in role- Strengths developed- Areas still needing support- Final suggestions/comments	<ul style="list-style-type: none">- Confirmation of readiness- Recognition of strengths- Plan for ongoing support	<input type="checkbox"/>

10. Documentation

- The trainee must maintain notes during shadowing
- The mentor must use a checklist to ensure all topics are covered
- Shadowing attendance log
- Shadowing checklist
- Daily activity summary
- Trainee questions/issues log
- Initial readiness assessment
- One-week post-shadowing review
- Trainee feedback survey
- Trainer/mentor feedback form
- Shadowing attendance log, Shadowing checklist, Daily activity summary, Trainee questions/issues log In

Post-Onboarding Evaluation & Follow-Up

Stage	Timing	Action	Purpose / Outcome
Shadowing Review	1 week after shadowing	<ul style="list-style-type: none"> Department Head to submit online shadowing report and activity summary to the training department <p>Title: Newly Hired Employee Shadowing Checklist Activity Link:https://forms.clickup.com/25781067/f/rjrub-51798/E136GCM32CSTOYJ8S1</p> <ul style="list-style-type: none"> The Buddy/Mentor will provide an evaluation and assessment of the trainee. <p>Title: Trainer/Buddy-Mentor Evaluation of the Trainee Link:https://forms.clickup.com/25781067/f/rjrub-44978/N1TX3ZETDBSGSRXPSN1</p>	Provide visibility on progress and identify support needs
Training sends Survey Check-Ins to newly hired	2nd week after shadowing	Send a short check-in survey	Assess adjustment and early engagement
Link: https://forms.clickup.com/25781067/f/rjrub-51718/9X7TYVF0C81HH3D7AX			
	2nd month of employment	Send progress survey	Measure confidence, role clarity, and satisfaction
	3rd month of employment	Send final follow-up survey	Evaluate long-term integration and retention insights

11. ATTACHMENTS

Title: Newly Hired Employee Shadowing Checklist Activity

<https://forms.clickup.com/25781067/f/rjrub-51798/EL36GCM32CSTOYJ8S1>

Title: Newly Hired Employees Wellness Check Survey Form (Trainee feedback survey)

<https://forms.clickup.com/25781067/f/rjrub-51718/9X7TYVF0C81HH3D7AX>

Title: Trainer/Buddy-Mentor Feedback

<https://forms.clickup.com/25781067/f/rjrub-44978/NTX3ZETDBSGSRXPSN1>

Title: Shadowing Checklist with attendance logs / Mentor Shadowing Checklist

https://docs.google.com/spreadsheets/d/1NdXF8xaXgvb3DZ1wm9EqCd2EggE1GPbGLNd_4VvImzg/edit?usp=sharing

Title: MOM Template with instructions for filling out

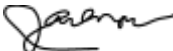
<https://docs.google.com/document/d/1jNPzp1eCquistpYazxjCOTL7GA65rDub/edit?usp=sharing&oid=105956333449196512716&rtpof=true&sd=true>

Title: Trainees FQA Checklist

<https://docs.google.com/document/d/1j-4ZpKP-6DQqHz3wBUtxBBktqPLNwjRP/edit?usp=sharing&oid=105956333449196512716&rtpof=true&sd=true>

Document History Log

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