PEOPLE, TRAINING & MANAGEMENT

30/60/90-Day Onboarding Checklist

Prepare the role before you hire.

Give every new team member a clear path from day one.

Build the repeatable system first

Before hiring begins, define the role, expected outcomes, linked SOPs, training sequence, trainer, and backup. Organize these in one role-based onboarding plan that can be reused for each hire.

Personalize the prepared plan

Before the employee starts, confirm access and equipment, assign training dates, and schedule the 30-, 60-, and 90-day check-ins. Adjust practice and support to the employee while keeping expectations clear.

Reflect before each check-in

Send the survey in advance and give the employee time to reflect. Agree on a due date that allows the manager to review responses before the meeting. At each check-in, listen, review real work, and record support and next actions. Keep regular support available between meetings.

What is inside

Page 2: a completed role example.
Pages 3-4: before-hiring and before-start checklists.
Pages 5-7: training milestones and 30-, 60-, and 90-day check-ins.
Page 8: a reusable employee reflection survey.

Completion means the action or skill has been demonstrated. Set role-specific standards, owners, and dates; use the blank rows for additional tasks. Adjust the pace of training when needed while keeping all three check-ins.

COMPLETED EXAMPLE

A plan you can adapt

Example role: client services coordinator

Role outcome: move routine client requests from intake to follow-up using the team's approved process. Manager: team lead. Trainer: experienced coordinator. The role plan, linked SOPs, trainer, and backup are ready before hiring. Adapt this example to your work.

Days 1-30 | Learn and practice

Learn the intake flow, service expectations, and escalation rules. Shadow three requests, then complete five routine requests with a trainer reviewing before they are sent.

Support: access to the request system, current SOP, sample requests, and a twice-weekly check-in.

Evidence: explain the handoffs and complete the five practice requests with the required details and an appropriate escalation.

Days 31-60 | Perform the role

Perform the routine job: prioritize requests, record status, and send approved updates. Questions are expected as new situations arise; ask for guidance and escalate exceptions.

Support: an available trainer for questions and a weekly review of five requests, with feedback on quality and any missed steps.

Evidence: the reviewed requests meet the agreed completeness and response standards; exceptions reach the correct owner.

By day 90 | Own the routine work

Run the routine work independently: manage the agreed workload, keep requests moving, and follow up on open items. Use established approvals and escalate unfamiliar or higher-risk requests.

Support: weekly check-in, named backup, and clear approval boundaries.

Evidence: two weeks of work meet agreed standards without routine prompting. At day 90, confirm ownership of the routine role and any remaining support needs.

At days 30, 60, and 90: collect the employee survey before the meeting, review it alongside work samples, and agree on support and next steps together.

REUSABLE CHECKLIST | BEFORE HIRING

Build the role first

Make onboarding part of the hiring system.

Role / plan owner: _____ Plan review: _____

Manager / trainer: _____ Review date: _____

Add an owner and dates. Check off completed actions; confirm skills through real work.

Done	Action or demonstration	Owner	Target	Done on
☐	Define the role, responsibilities, and success standards.			
☐	Link current SOPs and resources to each core task.			
☐	Organize the training sequence and practice activities.			
☐	Name the trainer, manager, and backup; confirm capacity.			
☐	Define approvals, escalation, and readiness checks.			
☐	Prepare the reusable plan, survey, and check-in process.			
☐	Role-specific task:			
☐	Role-specific task:			

Role outcomes / what good work looks like:

Resources, source of truth, and support contacts:

Next action / owner / date:

REUSABLE CHECKLIST | BEFORE THE START

Ready for day one

Personalize the system you already prepared.

Employee / role: _____ Start date: _____

Manager / trainer: _____ Review date: _____

Add an owner and dates. Check off completed actions; confirm skills through real work.

Done	Action or demonstration	Owner	Target	Done on
☐	Attach the prepared role plan and linked SOPs.			
☐	Confirm the assigned trainer, backup, and training dates.			
☐	Prepare equipment, access, and required permissions.			
☐	Schedule introductions and supported practice.			
☐	Book the 30-, 60-, and 90-day check-in meetings.			
☐	Set survey send/due dates before each check-in.			
☐	Role-specific task:			
☐	Role-specific task:			

Role outcomes / what good work looks like:

Resources, source of truth, and support contacts:

Next action / owner / date:

REUSABLE CHECKLIST | DAYS 1-30

Learn and practice

30-day check-in: listen, review, and support.

Employee / role: _____ Start date: _____

Manager / trainer: _____ Review date: _____

Add an owner and dates. Check off completed actions; confirm skills through real work.

Done	Action or demonstration	Owner	Target	Done on
☐	Review role expectations, resources, and help contacts.			
☐	Meet key people and trace the main handoffs.			
☐	Observe core tasks and explain the steps back.			
☐	Practice selected tasks with trainer feedback.			
☐	Review work samples against the role standards.			
☐	Employee completes survey; manager reviews before meeting.			
☐	Hold 30-day check-in; agree on support and next actions.			
☐	Role-specific task:			

Evidence reviewed / work the employee can now handle:

Support or practice still needed:

Next action / owner / date:

REUSABLE CHECKLIST | DAYS 31-60

Perform the role

Do the job, with questions and support expected.

Employee / role: _____ Start date: _____

Manager / trainer: _____ Review date: _____

Add an owner and dates. Check off completed actions; confirm skills through real work.

Done	Action or demonstration	Owner	Target	Done on
☐	Perform the agreed duties and manage the routine workload.			
☐	Complete routine tasks; ask questions as situations arise.			
☐	Prioritize work and communicate status and handoffs.			
☐	Use the trainer for guidance and escalate exceptions.			
☐	Review quality and follow up on the 30-day actions.			
☐	Employee completes survey; manager reviews before meeting.			
☐	Hold 60-day check-in; agree on support and next actions.			
☐	Role-specific task:			

Evidence reviewed / work the employee can now handle:

Support or practice still needed:

Next action / owner / date:

REUSABLE CHECKLIST | DAYS 61-90

Own the routine work

By day 90, keep the work moving independently.

Employee / role: _____ Start date: _____

Manager / trainer: _____ Review date: _____

Add an owner and dates. Check off completed actions; confirm skills through real work.

Done	Action or demonstration	Owner	Target	Done on
☐	Run the routine role independently to the agreed standard.			
☐	Meet priorities and deadlines without routine prompting.			
☐	Manage handoffs and follow up on unfinished work.			
☐	Use established approvals and escalate exceptions.			
☐	Confirm the 60-day actions are resolved and support is clear.			
☐	Employee completes survey; manager reviews before meeting.			
☐	Hold 90-day check-in; confirm ownership and next goals.			
☐	Role-specific task:			

Evidence reviewed / work the employee can now handle:

Support or practice still needed:

Next action / owner / date:

EMPLOYEE SURVEY | REUSE AT DAYS 30, 60 & 90

Reflect before we meet

Your experience helps us support you.

Employee: _____ Role: _____

Check-in: 30 / 60 / 90 days Meeting: _____ Survey due: _____

Complete this before your check-in so you have time to reflect and your manager can prepare. Be candid: the goal is to understand what is working and what support would help.

1. What is going well? What progress are you proud of?

2. Which tasks do you feel confident doing? Which need more practice?

3. Are your role, priorities, SOPs, and expectations clear? What is unclear?

4. What training, resources, or support would help you most?

5. How manageable is your workload? What slows you down?

6. What would you like to discuss or change at our check-in?

Together in the meeting: discuss your reflections, review progress, and agree on next actions.