

# Template: Employee 30/60/90 Onboarding Plan

## What this is

A comprehensive template you can customize for your company and embed into your new hire process to help your new employees feel acclimated and productive...faster.

## Why this matters

When a candidate converts to a new hire, they ask themselves “did I make the right decision?” They ask this question after the first day, their first month and even on their first anniversary. With the [average tenure in tech](#) startups landing at 50% of the average US economy tenure, your goal is to ramp your new employees to productivity faster and create an amazing first impression to extend that tenure runway for as long as possible. Your external talent brand will be influenced by the internal employee experience and impact your ability to attract talent in future.

## Who's involved and what's their role:

- **People/Operations/Talent:** Build, evolve and administer the onboarding process to enable managers and new employees with the tools, resources and guidance they need to be successful. That includes using this template to customize the onboarding experience at your company.
- **Hiring managers:** Create the new hire experience for their direct reports by engaging with the tools and processes at the company.
- **New hire:** Participate in the onboarding experience and are consulted for their feedback to evolve the process over time and scale.

## When to implement

As soon as possible. With size and scale, onboarding will become more complex. For earlier stage companies (<50 people), your onboarding process will set the foundations for your culture and employer brand.

**How to use this template:** Make a copy of this template, delete the above guiding text and add your company branding. Review the various sections, add / remove content as

needed and save a template version for your company. Then, embed in an existing process (e.g. once an offer is signed, the manager is sent the onboarding template to add content for their new hire and share with them on Day 1) and set expectations for those involved in making it successful.

Welcome, [NAME] to [COMPANY] 🎉

We're excited you're here. Starting a new job is so exciting...and, let's be honest, a little bit stressful. We have created this onboarding plan for you and your manager to help you settle in as a [INSERT WHAT YOU CALL YOUR EMPLOYEES].

**Here's what you can expect to find in this plan:**

[About \[COMPANY\]](#)

[1st day](#) things to:

- setup
- attend
- discuss with your manager
- read, complete and sign
- learn about that require your action shortly

[Week 1](#)

[Week 2](#)

[Week 3](#)

[Week 4](#)

[60 day check-in](#)

[90 day check-in](#)

[Manager resources](#)\*

[Helpful resources](#)













*\*if new hire is not a manager, delete section*

## About [COMPANY]

Vision, Mission & Values [INSERT LINKS OR RELEVANT INFO.]

This Quarter's Goals [INSERT LINKS OR RELEVANT INFO.]

Leadership Team

Photo	Meet your Leadership Team	How to Contact
	<b>FirstName LastName</b> <i>Title</i>  Bio: [LinkedIn Link] Based in: [City, State] Floor: [x] Desk Area: [x]	 x@company.com  (xxx) xxx-xxxx  (xxx) xxx-xxxx  @
	<b>FirstName LastName</b> <i>Title</i>  Bio: [LinkedIn Link] Based in: [City, State] Floor: [x] Desk Area: [x]	 x@company.com  (xxx) xxx-xxxx  (xxx) xxx-xxxx  @
	<b>FirstName LastName</b> <i>Title</i>  Bio: [LinkedIn Link] Based in: [City, State] Floor: [x] Desk Area: [x]	 x@company.com  (xxx) xxx-xxxx  (xxx) xxx-xxxx  @

## Your 1st Day!

## Set-up

- ☐ Your laptop and workspace
- ☐ Your profile on [INSERT TEAM SYSTEMS, EG SLACK, HR SYSTEM, GMAIL]

## Attend

- ☐ [INSERT LIVE ONBOARDING SESSION(S)]
- ☐ [INSERT ANY MEETINGS]
- ☐ Welcome 1:1 with [MANAGER NAME]

## Discuss with your manager

- ☐ This plan
  - ☐ Including expectations of what will be pre-scheduled and what you will need to initiate
- ☐ Working hours/schedule
- ☐ Contact details
- ☐ Get to know each other - see the below MadLibs activity template below to guide the conversation

Even though my name is \_\_\_\_\_, I prefer to be called \_\_\_\_\_. My pronouns are \_\_\_\_\_.

I grew up in \_\_\_\_\_. If you were to ask about my family, I would want you to know \_\_\_\_\_.

The people that work with me (either in the past or currently) would describe me as \_\_\_\_\_, but outside of work people would describe me as \_\_\_\_\_.

Most people believe I'm fantastic at \_\_\_\_\_.

However, my real expertise on this team could be \_\_\_\_\_.

One thing I really hope to do more in my current role is \_\_\_\_\_.

To be at my best and work at my best I need \_\_\_\_\_.

The work that is most draining to me is \_\_\_\_\_.

The work that gives me the most energy is \_\_\_\_\_.

My preferred communication methods are (email, phone, in-person, etc.)  
\_\_\_\_\_.

One thing I may do that will possibly get on your nerves is \_\_\_\_\_ if I  
do it, just let me know by doing this \_\_\_\_\_.

One of my biggest pet peeves is \_\_\_\_\_.

The best way to give me constructive feedback is to do  
\_\_\_\_\_, and \_\_\_\_\_.

If you ever want to get me food, here is my favorite thing to eat  
\_\_\_\_\_. You should also know that I do not eat  
\_\_\_\_\_ or drink \_\_\_\_\_.

One thing you probably don't know about me is \_\_\_\_\_.

In my free time, I enjoy \_\_\_\_\_, and  
\_\_\_\_\_.

### **Read, complete and sign**

- ☐ Your offer letter (if you haven't already)
- ☐ I9 employment eligibility verification form
- ☐ W4 (federal tax withholdings)
- ☐ State tax withholdings
- ☐ Direct deposit form
- ☐ US employee handbook
- ☐ Proprietary Information & Inventions Agreement (PIIA)

- ☐ Harassment, Sexual Harassment, Discrimination, and Retaliation Prevention Policy

## Learn

- ☐ Employee benefits & enrolment processes
- ☐ Employee perks eligibility & how to get them started

## Week 1

## Attend

- ☐ [INSERT ANY LIVE ONBOARDING SESSION(S)]
- ☐ [INSERT ANY MEETINGS]

Meeting Name & Frequency	Purpose	Who Attends	Link to Agendas
E.g. Team Meeting (Weekly)			
E.g. All Hands/Town Halls (Monthly)			

- ☐ Onboarding session(s) with [MANAGER NAME]

## Learn

- ☐ [COMPANY], brand, core values & team routines
- ☐ Company structure [LINK ORG. CHART]
- ☐ Department structure [LINK ORG. CHART]
- ☐ Department roadmap/priorities [LINK DOCS]
- ☐ Expectations of your job description [LINK JD or PASTE RESPONSIBILITIES IN THIS DOC]

## Explore

- ☐ [COMPANY] systems, tools & applications
  - ☐ [INSERT APPLICABLE SYSTEMS, TOOLS & APPS]

## Meet

- ☐ Your immediate team, including:
  - ☐ [INSERT NAME & ROLE]
  - ☐ [INSERT NAME & ROLE]
  - ☐ [INSERT NAME & ROLE]
  - ☐ [INSERT NAME & ROLE]
  - ☐ [INSERT NAME & ROLE]

## Week 2

## Attend

- ☐ [INSERT ANY LIVE ONBOARDING SESSION(S)]
- ☐ [INSERT ANY MEETINGS]

Meeting Name & Frequency	Purpose	Who Attends	Link to Agendas
E.g. Team Meeting (Weekly)			
E.g. All Hands/Town Halls (Monthly)			

- ☐ Onboarding session(s) with [MANAGER NAME]

## Learn

- ☐ [COMPANY] routines and preferred communication channels
- ☐ What others expect of you

## Explore

- ☐ Team dashboards [INSERT LINKS]
- ☐ Project plans [INSERT LINKS]
- ☐ Resources specific to your role [INSERT LINKS TO DRIVES, REPORTS, ETC]

## Meet

- ☐ Extended team & cross-functional partners, including:
  - ☐ [INSERT NAME & ROLE]
  - ☐ [INSERT NAME & ROLE]
  - ☐ [INSERT NAME & ROLE]
  - ☐ [INSERT NAME & ROLE]
  - ☐ [INSERT NAME & ROLE]

## Week 3

## Attend

- ☐ [INSERT ANY LIVE ONBOARDING SESSION(S)]
- ☐ [INSERT ANY MEETINGS]

Meeting Name & Frequency	Purpose	Who Attends	Link to Agendas
E.g. Team Meeting (Weekly)			
E.g. All Hands/Town Halls (Monthly)			

- ☐ Onboarding session(s) with [MANAGER NAME]

## Integrate

- ☐ Set recurring routines with your manager, key partners and direct reports (if applicable)



- ☐ Align on short term goals and priorities with your manager
- ☐ Initiate next steps on projects you're leading
- ☐ Continue building relationships with team you've met
- ☐ Begin using the tools and processes you've learnt

## Meet

- ☐ Key stakeholders, including:
  - ☐ [INSERT NAME & ROLE]
  - ☐ [INSERT NAME & ROLE]
  - ☐ [INSERT NAME & ROLE]
  - ☐ [INSERT NAME & ROLE]
  - ☐ [INSERT NAME & ROLE]

## Week 4

## Attend

- ☐ [INSERT ANY LIVE ONBOARDING SESSION(S)]
- ☐ [INSERT ANY MEETINGS]

Meeting Name & Frequency	Purpose	Who Attends	Link to Agendas
E.g. Team Meeting (Weekly)			
E.g. All Hands/Town Halls (Monthly)			

- ☐ Onboarding session with [MANAGER NAME]

## Impact

- ☐ Deliver 30 day objectives
- ☐ Clarify expectations of your role with your manager

- ☐ Finalize short and medium term goals with your manager
- ☐ Set priorities for the next month
- ☐ Continue building relationships with team you've met

## 60 day check-in

We recommended the Employee/Manager complete this exercise in parallel and compare notes. Where are you aligned? Where are there differences? Revise it together and reach a shared agreement.

What are your observations & impact against objectives set for the first 60 Days?	
Role against expectations	How have the last 60 days gone from your perspective? Are you experiencing what you expected? Any surprises?
Impact & delivered objectives	1. 2. 3.
Key Observations	1. 2. 3.
Support or clarity needed	1. 2. 3.

## 90 day check-in

We recommended the Employee/Manager complete this exercise in parallel and compare notes. Where are you aligned? Where are there differences? Revise it together and reach a shared agreement.

What do you view as your mission in this role?

What should you stay focused on to stay committed to the purpose of this role?

What are the metrics (qualitative or quantitative) that will measure whether the mission of the role has been/is being fulfilled?

What are 1-3 growth areas you'd like to begin focusing on? What support is needed?

**\*Manager resources (if you are leading a team)**

*\*Remove this section if the new hire is not a manager*

[INSERT LINKS/CONTENT APPLICABLE TO THE BELOW HEADERS]

- ☐ Manager tools & applications
- ☐ Internal processes (e.g. hiring, promotions, compensation)
- ☐ Required trainings
- ☐ Team engagement overview
- ☐ Employee performance overview

## Helpful resources

[INSERT LINKS/CONTENT APPLICABLE TO THE BELOW HEADERS]

- ☐ Common acronyms
- ☐ Asynchronous routines
- ☐ Resources to learn about our business/industry quickly
- ☐ Employee resources groups

☐ History & context relevant to your role