



EMPLOYEE NAME

START DATE

THE FIRST 90 DAYS: ENGAGEMENT CHECKLIST

Engage your people from day one: use this checklist to guide employee development and engagement for the first 90 days. It can be used for new employees and managers, as well as those transferring to new roles within your organization. This is one example that could be adjusted to fit different roles, companies and industries.

Supervisors can follow this checklist to ensure their direct reports are getting what they need. Each employee should also have access to this checklist, so they can take ownership of their development.

OBJECTIVE

Ensure new team members:

- Have everything they need to be successful from day one
- Understand the expectations of their role and responsibilities
- Align to how they, as individuals, impact the team/department/company objectives



PRE-BOARDING

- Work with the appropriate person to determine the best seating option**
- Complete 90-day onboarding plan**
- Select an Onboarding Mentor, a team member who will help the new hire get acclimated**
- Schedule:**
 - *First day one-on-one meeting*
 - *Weekly one-on-ones thereafter*
 - *Lunch on first day or multiple days during the first week*
- Add to necessary meeting invites (team, project, staff, etc.)**
- Ensure computer/other required equipment will be ready for first day**
- Gather necessary office supplies**
- Call new hire and provide details:**
 - *High level overview of role/responsibilities*
 - *Where to park*
 - *What time to arrive*
 - *Where to go once in the building*
 - *Name of Onboarding Mentor and overview of their role*
- Email new hire:**
 - *90-day onboarding plan*
 - *Corporate onboarding material(s), if applicable*
 - *Recent corporate videos, annual reports, etc. to familiarize them with the company*

DAY 1



WELCOME

- Facilities tour
- Introduce to immediate team members and other relevant associates
- Remind them to submit their new hire information to HR
- Schedule time for a wrap-up at the end of the day
- Cover their 90-day onboarding plan in detail
- Review email, phone system, timekeeping and other administrative details
- Discuss necessary/mandatory training (start date, what to expect, why it's important, etc.)

WEEK



DEEP DIVE INTO JOB FUNCTIONS

- Review and explain the purpose of:
 - *Company strategy & department/team goals*
 - *New hire's formal development plan*
 - Set initial expectations of what you think his/her business goals should be
 - Explain company's personal development philosophy and his/her role in creating an individual plan
 - Set a timeline for when the development plan should be completed
 - Establish some quick wins that can be accomplished in the next 30 days
 - *Organizational chart*
 - Provide a broad overview of all functions and explain:
 - *Primary purpose of each*
 - *How they interact with department/team*
 - *Critical positions, what they do and why they're important*
 - Do a deep dive into function
 - *Explain each department in depth*
 - *Core responsibilities*
 - *How they interact with your team*
 - *Key people in each department*
 - *Discuss all managers, their teams and what projects/responsibilities they oversee*
- Recommend key stakeholders for the new hire to schedule one-on-one meetings

DAY



CHECK-IN

Formally check on progress

- *What's going well in his/her job?*
- *Where is s/he running into roadblocks? (What can you do to remove them?)*
- *What did s/he find helpful in their onboarding over the last month?*
- *What would s/he improve (for future new hires)?*
- *What has s/he learned over the last 30 days?*
- *How are things going with his/her Onboarding Mentor? (If things aren't going well, would someone else be more effective?)*

Have him/her complete their development plan

- *What's happened over the last 30 days?*
 - *Has anything changed – for the better? Or worse? (If so, how can you help correct it?)*
- *What sort of observations about the organization does s/he have?*
 - *Highlights – what can we leverage more to maintain his/her productivity and success?*
 - *Improvement areas – quick wins vs. longer term opportunities?*

DAY



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CHECK-IN

Formally check on progress

- *Does s/he feel s/he has everything needed to be successful? (information, knowledge, support, resources, etc.) If not, what needs to change?*
- *What has been his/her biggest "aha moment" over the last 90 days?*
- *How is s/he progressing toward his/her development plan?*
- *What's going well? What isn't?*