



First 90 Days Onboarding Checklist





This checklist will help you create a successful onboarding experience for new hires.

69%

of new employees are more likely to stay at a company for 3+ years if the onboarding experience is successful.

This checklist is a great starting point to help provide your employees with a great first impression.

How to Use this Document:

You will first see the checklist. Following this is a second version with fully editable text so you can customize the policy to the needs of your organization.

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FIRST 90 DAYS ONBOARDING CHECKLIST – TEMPLATE

The #1 thing that organizations get wrong about onboarding is that HR and frontline managers can get bogged down with administrative tasks that take them away from focusing on the more important matters.

According to the Center for Effective Organizations, tedious transaction tasks like administering employee benefit plans, processing payroll, and responding to employee questions take up over 73% of an HR professional's time.

Onboarding can quickly and easily become nothing more than managing administrative details that, while important, are not the kinds of things that make employees stay and be productive.

For example, if you're not automating onboarding, this can happen to the new hire as well as HR:

- Days spent in an office filling out paperwork versus meeting the team and spending time learning their role
- Paperwork creating inefficiencies
- Time spent tracking down information
- Re-keying information into multiple systems
- Confusing first impression of the new organization because there's no coherent look, tone, and feel to the process

Bottom line, managers and HR shouldn't get caught up in the administrative details. As much as possible, everything that can be automated should be automated so everyone can focus on the crucial, important business at hand instead of tasks. Ideally, new hires can enjoy their new hire experience by having paperwork and necessary training completed before their official start date.

THE FIRST 90 DAYS

In general, here are some guiding principles that employers should make a priority during the first 3 months of a new hire's employment:

- ☐ Provide position-specific training as well as cross-training if possible. The more your new employee knows, the more useful this person will be to your company.
- ☐ Carefully monitor job performance, and provide constructive feedback where appropriate.
- ☐ Schedule regular check-ins, soliciting feedback regarding observations about your business policies and procedures.
- ☐ Monitor the effectiveness of the employee you assigned as a mentor or buddy, providing guidance as needed to that employee.



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More specifically, here's what each phase looks like:

30 DAYS

This is when your new employee gets the hang of things. They're still getting used to a new work environment, so introduce them to job-specific tools and projects and set small goals.

- ☐ Verify that all required new hire training has been completed.
- ☐ Set up 30-minute introductions with all of the other employees your new hire will be working with.
- ☐ Schedule weekly check-ins to gauge how your new hire is doing.
- ☐ Ensure your new hire is comfortable with the tools that are necessary for success.
- ☐ Conduct a 30-day review.

60 DAYS

This period involves more collaboration and bigger responsibilities. It's a time to ease off on the training and focus more on the doing.

- ☐ Meet with the employee a minimum of 1-2 hours every other week to identify how they're doing, what they've learned, challenges faced and get to know them better personally.
- ☐ Review achievements against expectations to date. Give constructive performance feedback early and often.
- ☐ Use this date as a checkpoint. Is this person the right person for the job? Are they the right fit? Do they have the skills they "sold" during the interview process?
- ☐ Conduct a 60-day review

90 DAYS

Now is when you'll start taking off the training wheels.

- ☐ Your new hire becomes accountable for their work and is able to accomplish projects with limited guidance from you.
- ☐ Assign your new employee a major project that involves other departments.
- ☐ Conduct a 90-day review.

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