

Onboarding & Training Checklist

A 90-Day Framework for Setting New Hires Up for Success

This checklist provides a structured approach to onboarding and training new employees over their first 90 days. Use it to ensure accountability, track progress, and set clear expectations at every stage.

1. Define Clear Goals for Each Phase

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| 30 Days | Focus on orientation and foundational skills. Ensure the new hire understands company values, team dynamics, and immediate tasks. Set up daily or weekly tasks and clarify key performance expectations. |
| 60 Days | Transition to deeper skill-building and integration into projects. The new hire should start taking ownership of specific tasks, developing routines, and building relationships with team members. |
| 90 Days | Encourage independent work and problem-solving. By this stage, the new hire should understand their role and begin adding value autonomously. Discuss long-term goals and growth areas. |

2. Create Checkpoints for Progress Review

- Weekly Check-Ins (First 30 Days) - Schedule brief weekly meetings to review initial progress, clarify questions, and address early challenges
- Bi-Weekly or Monthly Reviews (After 30 Days) - Shift to bi-weekly or monthly reviews to dive deeper into performance and optimize workflow
- End-of-Phase Assessment (30, 60, 90 Days) - Conduct thorough reviews to assess progress, acknowledge achievements, and identify growth areas

3. Encourage Self-Assessment and Reflection

- Pre-Check-In Self-Review - Provide a template for the new hire to assess their work, noting successes, improvements, and questions
- Reflection Questions - Encourage them to think about what they learned, challenges faced, and how they overcame them

4. Prioritize Core Responsibilities First

- Keep Initial Focus Narrow - Avoid assigning too many tasks initially; help them master core responsibilities before expanding
- Provide a Task List or Workflow Outline - Offer written guides or checklists to ensure tasks are completed correctly

- Gradual Role Expansion - Once they demonstrate competence, introduce new responsibilities that align with their role

5. Implement Regular Feedback Loops

- Constructive Feedback in Check-Ins - Provide clear, actionable feedback at every checkpoint
- Use the Start, Stop, Continue Model - Tell them what to start doing, stop doing, and continue doing to excel
- Recognize and Celebrate Wins - Celebrating milestones boosts morale and motivates continued improvement

6. Hold New Hires Accountable with Clear Consequences

- Expectation Setting - Reinforce expectations early to emphasize accountability and discuss impact on team goals
- Consequences for Missing Targets - Let them know how failing to meet standards affects them and the team
- Create a Plan for Missed Goals - If they struggle, develop a clear improvement plan with specific goals and deadlines

7. Create a Culture of Open Communication

- Encourage Questions - Let them know it's okay to ask for help or clarification
- Regularly Check for Understanding - Ensure they're comfortable with tasks and ask for their insights and suggestions

8. End-of-Training Evaluation and Next Steps

- Final Performance Review (90 Days) - Conduct a comprehensive evaluation to assess overall performance and growth areas
- Discuss Future Development - Set new goals aligned with company objectives and outline further development opportunities
- Build a Feedback and Support Plan - Set up ongoing bi-monthly or quarterly reviews for continued improvement