

Master your 30-60-90 day onboarding experience

Set your new hires for success



So, you've managed to fight off the competition and hire those candidates who impressed so much. Congrats!

While it's tempting to breathe a sigh of relief and give yourself a pat on the back, the reality is that the hard work has only just begun. In particular, the first three months can often make or break an employee's time with you. It's where you can set the tone for what's to come with a good onboarding process, and set them up for success with you.

Studies have shown that [employees with a good onboarding experience are 82% more likely to stay with the company](#) — which can translate into both better productivity and big savings on recruitment costs for you.

Research also suggests that **structured onboarding can lead to a 60% improvement in year-over-year revenue**. Get it wrong, however, and you're looking at disengaged employees who can hamper productivity and revenue — [and are twice as likely to leave](#).

Think about the time and money which goes into hiring someone. The last thing you want is to go through it all over again because an employee leaves soon after joining.

Yet studies have shown that [around a third of employees leave a job within the first three months](#), which could perhaps have been prevented with better onboarding.

It's important to note that when we talk about onboarding, it actually starts earlier than you think. You need to put things in motion before the new joiner starts — for example setting them up on the systems, getting equipment organized, circulating a bio of them to the business and arranging induction meetings so their early days are already nicely planned.

In fact, even before you've hired someone — during the screening process — they should be getting information that gets them familiar with how you operate and what your values are. The old saying **“fail to prepare, prepare to fail”** definitely applies here!

And of course, things don't simply stop there. In the same way your employees are always growing, you need to continue your engagement efforts with them.

Onboarding isn't easy to get right though — especially in a world where remote and hybrid working has become so popular. That's why we've put together this 90 day plan template.

Read on for some handy tips to help you successfully onboard your new talent!





Types of onboarding plans

The first thing most people think about when it comes to onboarding is that it's for bringing new employees up to speed in your company. It is that – but it's a lot more than just welcoming your newest hires.

The typical employee lifecycle in a company often involves transitions, restructurings, developments, new product releases, changes in strategy, and many other aspects that impact one's day-to-day work processes and requires an 'onboarding' for those processes to continue to succeed.

Let's look at the various situations that can benefit from onboarding plans. Keep in mind that all of them can have the same goal at the end: to prepare an employee for something new.

1. New hires

This is the most common type of onboarding plan. It's designed to introduce new employees to the company's culture, policies, procedures, org charts, and ultimately their own role in the organization.

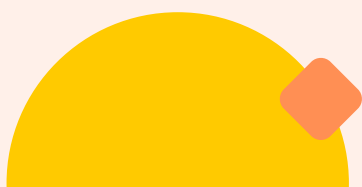
Typically, this plan includes orientation sessions, one-on-one meetings, job-specific training, training on tools and softwares, introductory lunches, and so on.

The objective is to help new employees feel welcome and integrated into the team, and shorten the ramp to full productivity.

2. New project launches

Often, a company will launch a new feature, product or service that will involve new campaigns, processes, strategies and so on to get that out into the marketplace, introduce it to existing/new customers, and bring in new revenue.

This involves onboarding the various teams and employees who will be a part of that launch – and this includes details such as project goals, timelines, roles and responsibilities, and even learning the new product or service itself.





3. New sales strategies

Whether it's due to the launch of something new, a restructuring of the sales function, a new market penetration or a sales kickoff, sales teams will need to be updated on new strategies so they can be set for success.

This can involve trainings on new sales techniques, product/service knowledge, customer research and market trends – all of which can be conducted through classroom or virtual sessions, role-playing, or one-on-one coaching.

4. Training and development

Learning & development is fast becoming a staple of any human resource strategy. L&D can be focused on new hires and existing employees alike – with a focus on both intangible and tangible skills growth.

Examples include trainings on diversity, equity and inclusion, effective communications, compliance assurance, and any other form of employee growth and development that can be carried through with an effective onboarding plan.

5. Acquisitions and mergers

Often in business, you'll see acquisitions of other companies or technologies, or mergers with the same. When two divergent groups of employees or technologies come together, this necessitates an onboarding plan to ensure that they work together without losing traction.

This can include training on how to use and integrate new technologies, how to work with others, what the “other” company's focal product or service is, familiarization with new policies and procedures, and understanding new systems, processes and tools.



Keep the eye on the prize

Let's tie all this back to the core concept of **"onboarding"**.

It is, ultimately, familiarizing an employee with an area with the goal of setting them for success.

Whether that's getting a hire acquainted with their new job and company or building up an existing employee's repertoire of skills, the end result is the same: they are getting the knowledge and resources they need to do their job better.

And, of course, if your employees are better at their work, your bottom line benefits.

The 30-60-90 day onboarding framework

Those first few months of a new employee's journey or a shift in an existing employee's focus can strongly impact their level of engagement, productivity and overall success in their work. That's why a structured onboarding framework is so critical – it's more important than onboarding itself.

That's the 30-60-90 day onboarding framework for you – it's to provide a **consistent, uniform and thorough onboarding experience**. It clearly outlines the activities, resources, and expectations for those first three months of an employee's journey, setting them up for success in their role.

The benefits for the employee are clear – they **reach higher productivity in a shorter time** (in other words, their 'time to ramp' is shorter). They're more vividly engaged, they understand what's expected of them, and they know how to do the work.

For the organization, this results in greater average revenue per employee, lower turnover, and a stronger reputation as an employer that believes in developing their people.

This 30-60-90 day onboarding blueprint is structured in three phases with end goals for each: at the 30-day mark, you've set a foundation for that employee. By the 60-day mark, you're establishing a **clear momentum for the employee to thrive**.

And, finally, at the 90-day mark, you're ensuring that this fully onboarded employee is **ready to work autonomously and independently** because they've learned what they need to know to succeed in their role.



30-day plan: the foundation

We'll start the 90 days plan with another famous adage: **"Culture eats strategy for breakfast."**

It's a given that you'll be spending a fair bit of time during the first 30 days giving job-specific training to your new starters. But equally, a key focus should be on embedding them into the company culture and helping them build connections.

Here are some ideas.

Designate a work 'buddy' — this should be someone from the team who isn't their manager. They can be the go-to person who shows them the ropes and gives advice. As this person will be a peer, rather than a manager, they'll probably have gone through the same experience themselves so can empathize.

Link up new starters who are in a similar boat to each other. For example, you could set up a dedicated Slack or Teams channel which joiners are part of for their first few weeks.

Organize a team lunch. Ideally this can be done together in the same place, but if it's not possible, you can still do it virtually. Why not send the new starter a voucher for them to order the meal of their choice? Regardless, you should send them a small reward and note of appreciation after their first week — it's a nice gesture which will put a smile on their face!

Arrange **"get to know" meetings** with people the new starter will be working closely with. This is not a work-related induction, but more of a social meeting to break the ice and find out about each other. These meetings should be quite casual and don't need any sort of agenda beforehand.

You can group people together — for example, instead of meeting all the web developers individually, they can be part of the same meeting. At the same time, try to keep the number of people in these chats quite small, perhaps to a maximum of four or five. Any more can make them feel daunting, which is the opposite of what you're trying to achieve!

Basically, it should feel more like a coffee date, and less like you're being grilled on a reality show!



At this stage, managers should have a quick 10-minute catch-up with the employee at the end of each day, just to see how they're getting on. Meeting lots of different people can be a little overwhelming, so having a regular chat with the same person each day adds a sense of routine. One constant throughout the onboarding process (and beyond) is wellbeing, so ensure managers are still checking in regularly. Pay particular attention to signs of burnout — it's not uncommon for employees to push themselves extra hard during these opening few weeks.

As mentioned earlier, training is very important during this stage of the 90 days plan. If you aren't giving people the tools they need to be successful, it won't work out for you or them. Things which should be included within the training plan are:

- **Company strategy**
- **Sales positioning**
- **Department objectives**
- **Individual KPIs**
- **Best practice methods**
- **Systems and ways of working**



A quick word on those individual KPIs we just mentioned. Make sure you are completely clear on what these are — the employee needs to know exactly what's expected of them, how it links into the wider organization goals, and what metrics you'll be using for their work. Setting expectations properly reduces the chances of confusion later on down the line.

When it comes to training, try to make this as interactive as possible. People should be able to ask questions and even make suggestions. When training them for the tasks they'll be doing, incorporate a mix of different learning methods. There may be some things which they can study and practice in their own time, whereas others may require them to learn on the job or be shown step by step.

If you have an online L&D programme in place, select the courses which you think will be most relevant to their job. This tailors their training and saves them from having to scroll through lots of different ones.

As for the actual work your new starter will be doing, this can vary based on the role and level of seniority. Try to make it engaging though — enthusiasm levels are normally super high at this stage, so you want to tap into this as much as possible. Perhaps you could set them a list of things to do each week and turn it into a fun challenge with points and prizes?

60-day plan: the momentum

Feedback is crucial, and it's a very important way to keep the new starter engaged and focused. Managers should give this on each piece of work. Remember it's still early days, so don't expect perfection. At the same time, employees appreciate honesty so give them constructive feedback, and ask for theirs as well. Is there anything they think should have been done differently in the opening weeks?

It's also a good time for managers and employees to have an honest discussion about the goals that were set early on. Does anything need to change? Does the employee feel like there are more things they could take on? Either way, do what you did the first time and communicate clearly.

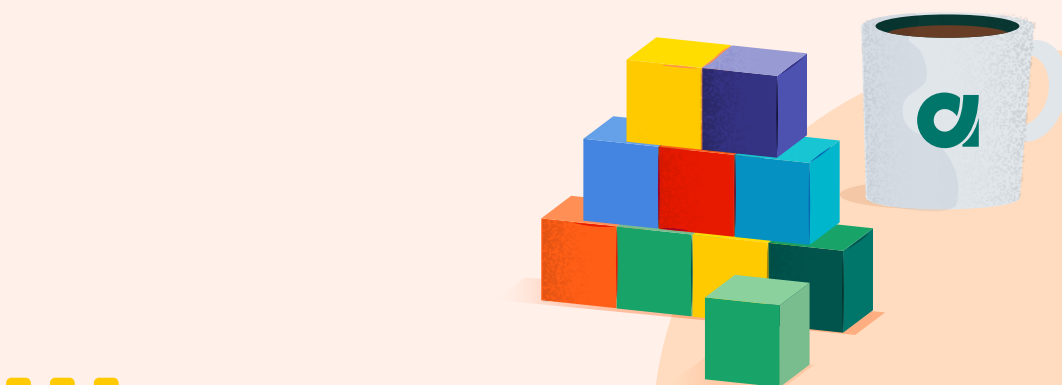
It's also important that people feel appreciated. Make sure you celebrate the small successes. If they work in Customer Service, make a big deal of the first ticket they resolve. If they're in Marketing, recognise them for that first blog they wrote. This could be a formal shoutout on the recognition platform you use, or even just a round of applause during your end of week wrap-up. Try and link these recognitions to your company values — this is a great way to remind the employee what you stand for.

Try to back the recognitions up with a reward as well. By getting a reward for displaying the right behaviors or for good work, it gives them a morale boost and a sense of gratitude.

Remember, learning doesn't just stop after day 30 — but now it continues with **the act of building**. This is where you trust them to do more independent work and go deeper into their responsibilities. Normally, there are two routes you can take.

If there's a specific project that was earmarked for them before they joined, allow them to run with this.

If the type of work they do is naturally quite repetitive — perhaps they work on the tills at a shop — ask them to come up with ideas to improve some aspect of what you do. This is a great way to keep them engaged and shows that you see them as a valuable part of the business.



It also usually involves them needing to collaborate with other departments, which brings its own benefits in terms of relationship building.

Whichever one of the two routes you choose, ask them to follow the **Plan, Develop, Implement model**. Here's a quick breakdown.



Plan:

This is where the employee does their research, asks the questions they think are relevant, and puts together a strategy for what they think needs to be done. Give them the time, space and tools to do this.

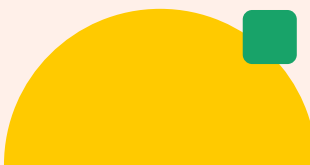
Develop:

Once the plan has been put together, the employee uses it to develop a solution. For example, if they're in Business Development, maybe they have a better way to reach out to prospects. They can get these new ideas together and test them internally.

Implement:

Now the employee takes the results from their tests and puts them into practice. This is where they'll feel like they're doing what they were brought in to do, and managers will be able to judge how far along they are. At all times, managers should ensure help is available if needed — but allow the employee to take control.

Now, we mentioned how this type of task allows employees to build relationships with others in the company. But there's other ways to do this as well, for example organizing social events. For example, at Perkbox, we have monthly 'Meet 'n' Greet' events which are an opportunity for new starters to meet with people in social settings.





90-day plan: the independence

This last phase of the 90 days plan should help **employees feel like they're a fully-fledged part of the business**. All being well, by the end of this period, they should have less of a 'new starter' feeling.

The employee should by now be nicely bedded in from a cultural point of view. This doesn't necessarily mean they run to the karaoke machine on nights out — but they should feel comfortable with their colleagues. If they still seem a little uncomfortable, it's the manager's job to get to the bottom of this.

A core measure of success at the 90-day stage is whether or not you're able to grant full ownership to the employee. You should be able to confidently assign them projects without walking them through the steps of how to see it through to completion.

At the 90-day mark, that employee is equipped with the knowledge — and experience — to independently make decisions to move the project forward. They no longer will need to 'check in' with their manager or seek approval or validation before moving forward.

Of course, there's always that question of making a mistake — **can you trust your employee to do the right thing to ensure success?** Well, that's what onboarding is for in the first place — when you can trust your employees, you've onboarded them successfully.

What else? Performance reviews. While you no longer require the employee to be checking in with you or other colleagues to get a job done, you do check in with them at the end in the performance review. This is your opportunity to go through their performance, both in the first 90 days and in the long-term, and identify areas where they can do better and shine a light on areas where they've done well. In fact, it's not simply a review — think of it as a **refinement**.

A little different from the performance review is a simple check-in with HR. Ask the employee how they've found the onboarding process to date. Is there anything they feel should've been done differently? Not only does this help you improve the process for the future, but it shows the employee you take their opinions seriously.

Hopefully by now they can also let some of their other passions shine through. For example, do you have any Employee Resource Groups or social clubs that appeal to them? Send a reminder of these and encourage them to put themselves forward if they want.

Often, people who join up with these things early on in their time at a company, develop really strong connections with colleagues. This can only be a good thing from a retention point of view!

Those first three months are key for success

Those first 90 days of an employee's journey within an organization, a new strategy, a different process, etc., sets the tone for their entire tenure going forward. A bad onboarding plan has obvious adverse effects – someone who isn't properly familiarized with their roles won't be able to rise to expectations. They get frustrated, demoralized, and worst of all, toxic. Cue 'quiet quitting', costly turnovers, and overall disenchantment.

Think of it as keeping a car properly maintained. When every part of the car is well-maintained, the engine is tuned regularly, the tires are leveled, the exterior is washed, the interior deep-cleaned, then the car lasts longer and performs better.

Your organization is your 'car' – keep it attuned, updated and optimized with a well-structured onboarding process for every step of the way, and it'll pay dividends for you in the long run.





New employee checklist

- Name of new employee:
- Role:
- Department / Function:
- Manager:
- Planned Start Date:

| Practical Stuff | Who will do it? | Date to be completed | Completed |
|--|---|---|-----------|
| Offer letter & contract | HR | Within 24 hours of verbal offer acceptance. | |
| Background checks | HR / Outsourced to supplier | At the same time the offer is sent out | |
| HR, payroll info and identification | HR | Before start date | |
| Seat / space to be allocated Desk, Chair & Pedestal – (home equipment for remote workers) | HR / Office Manager or Facilities Manager | On acceptance of role | |
| Stationery kit to be supplied | Office Manager to order | Ready before start date | |
| Internal Telephone – which extension will be allocated Telephone list updated | OM to organize and update telephone list | Completed before start date | |
| IT equipment - Computer, mouse, keyboard, screen, cables etc. Software – select appropriate fonts Printer connection Email account set up Server – user rights access Wiki / Intranet set up HRIS set up and access * Others might include function specifics - e.g. Notion, Adobe, Trello, Asana, Jira, etc. | IT Manager | Ready to go for day one | |
| Desktop to be set up | IT | | |
| Mobile – Yes / No | OM to organize number & phone etc | Before start date | |
| Business Cards – Yes / No | Production Manager to order | | |
| Added to team organogram | HR / Office Manager | | |

| | | | |
|--|---|--|--|
| Assign a buddy – give them the heads up on requirements | Line Manager to action | Before start date and induction planning | |
| Handover with previous job holder needed? | Line Manager to action | Before start date if incumbent is leaving and induction planning | |
| Planning of Induction and Onboarding – timings / content / scheduling | Line Manager, Buddy, Business Partner, IT & HR | Completed latest one week before start date to allow diary times to work | |
| Make individual aware of arrangements on first day | Line Manager to call | Week before start date | |
| Comms to be sent prior to start date: Congrats card Intro copy to team First Day (who to meet, when / where) what to wear, where to park, etc. | Nice touch to send a note from the CEO / managing director to welcome them. HR / Manager to organize other communications and arrangements | | |
| Team Intro Update website / HRIS pic, profile and / or video | Team leader / department leader | Within first four weeks | |
| Briefing on end of week presentation - nice to do to see what your new member of the team has learned | Line Manager | Start date to be delivered on First Friday update | |





Supplies



Pens / Highlighters



Stapler



Ruler



Notebook



Folders



Post-it notes

Software Licenses / Access Needed

(examples below - create your own list)



Technology

- Trello
- Asana
- Notion
- Jira



Design

- Adobe / InDesign



General

- Microsoft Office
- Google Workspace

Download an editable checklist for your own use!



Some assets you may want to create as an use info guide for your new starter



- **Tools they will use:** A document with links / logins / guides
- **Local area fact sheet:** Coffee/cafe options, lunch tips, local gym/classes, nearest park, etc.
- **Social profiles:** Boilerplate text is useful for new hires to add to their social profiles to ensure uniform messaging about your brand
- **Fact sheet or glossary:** Industry/company terminology
- **Slack channels:** Which channels to join to make them feel welcome and so they don't miss company updates, etc.
- **Company timeline and history** - always makes for a nice story
- **Welcome letter from CEO or another executive** – a video message can be powerful
- **SWAG** where applicable
- **Benefits:** How to access, manage, etc.
- **Mental health signposting sheet** and supporting documents / services
- **Do and don'ts:** How we do things around here
- **Fob and building access/security codes**, etc.
- **Info about showers / parking / bikes**, etc.
- **Team or culture activities invites / social calendar**



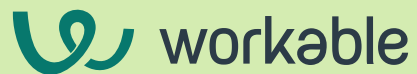


Cultural alignment

Embed your values into the recruitment process

Scaling this up

Use tech to optimize and automate



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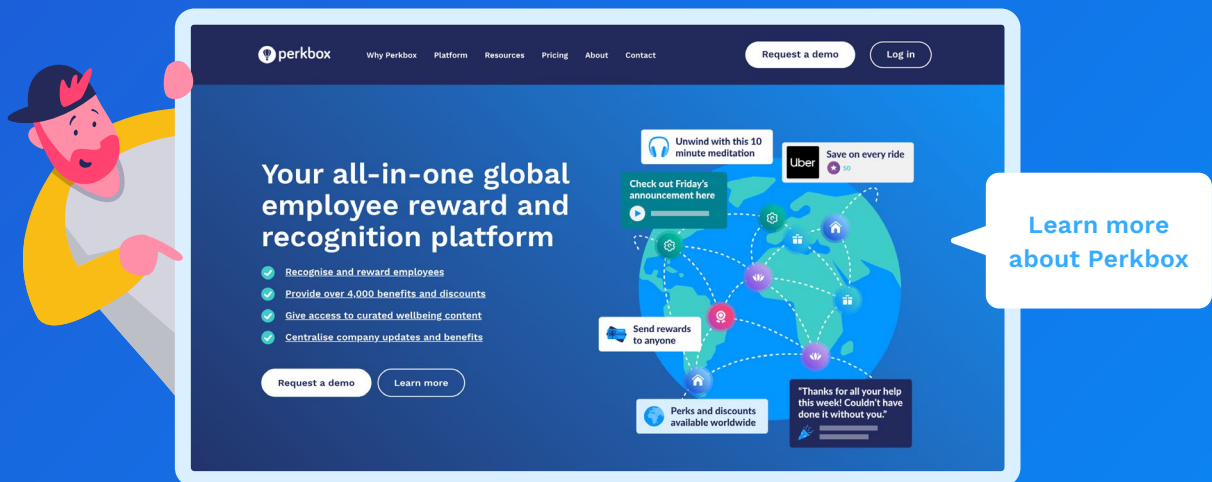
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Perkbox is a global reward and recognition platform that powers high-performance cultures. We help organisations align every employee in every location to their company values.

Trusted by over 4,000 businesses across the globe, Perkbox fuels reward and recognition programmes that drive employee engagement and business performance.



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