PDF GUIDE

Onboarding for Retention

Building a First-90-Days Experience That Engages and Grows New Hires

A practical, manager-led playbook for preboarding, the first week, and the 30-60-90 day journey — with checklists, templates, conversation prompts and success measures you can put to work with your next hire.



FOR HIRING MANAGERS · PEOPLE LEADERS · HR & ENABLEMENT TEAMS

INTRODUCTION

The first 90 days set the trajectory

New hires decide early whether a role is somewhere they can belong, contribute and grow. This guide helps managers make those early days deliberate rather than accidental.

Onboarding is often treated as an administrative process — equipment, accounts, paperwork and a slide deck about company history. Those things matter, but they are not what keeps people. What keeps people is clarity about what good looks like, early proof that they can succeed, real relationships with colleagues, and a manager who invests in their growth. Each of those is built through specific, repeatable behaviors.

This guide organizes those behaviors into five phases, from the moment an offer is accepted through Day 90. For each phase you will find goals, manager actions, new-hire actions, the role of a buddy or peer, and a milestone check-in. Templates and tools follow, so you can adapt the approach to your team rather than start from a blank page.

IN THIS GUIDE

01	Why onboarding drives retention	Six principles that shape every phase	p. 03
02	The 90-day journey at a glance	Five phases, one connected experience	p. 04
03	Phase-by-phase playbook	Goals, actions, buddy role and milestones	p. 05
04	Preboarding checklist	Everything ready before Day 1	p. 07
05	Day-1 agenda & buddy program	A strong first day and a peer guide	p. 08
06	30-60-90 plan template	A shared plan the new hire co-owns	p. 09
07	Manager check-in prompts	Conversation guides for Days 30, 60 and 90	p. 10
08	Pulse survey & success metrics	Listen early; measure what matters	p. 11
09	Warning signs of disengagement	Spot drift early and respond well	p. 12
10	Quick-reference summary	The whole guide on one page	p. 13

HOW TO USE THIS GUIDE

Read the principles and phase playbook once, end to end. Then copy the templates into your own tools — a shared document, your HRIS, or a calendar series — and schedule the check-ins before the new hire's first day. The single most effective step is putting the Day 30, 60 and 90 conversations on the calendar in advance.

01 · FOUNDATIONS

Why onboarding drives retention

Retention is not won at the exit interview. It is shaped in the first weeks, when a new hire is testing whether the promises made during hiring hold true.

1. Belonging comes before performance

People do their best work when they feel welcomed and connected. Introductions, a buddy and inclusion in team rituals are not extras — they are the foundation for contribution.

2. Clarity reduces anxiety

Ambiguity about expectations is one of the fastest ways to erode confidence. Define what success looks like at 30, 60 and 90 days, in writing, and revisit it together.

3. Early wins build momentum

A meaningful, achievable contribution in the first few weeks proves to the new hire — and the team — that they belong here. Design for an early win deliberately.

4. The manager is the experience

HR and enablement can provide structure, but the manager's consistency, availability and coaching determine how onboarding actually feels. Onboarding is a manager-led process.

5. Growth must be visible from the start

New hires want to know where the role can lead. Talking about strengths, development and future paths early signals long-term investment, not just a job to fill.

6. Listening closes the loop

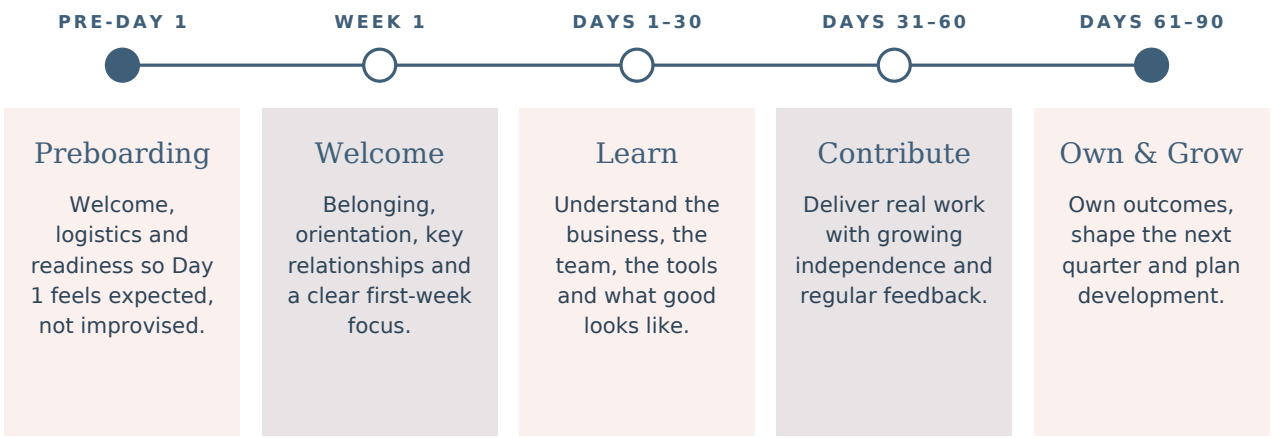
Regular, structured check-ins and short pulse surveys surface friction while it is still easy to fix. Ask, act and show what changed as a result.

The behavior shift: move from **onboarding as orientation** (a one-week event run by HR) to **onboarding as integration** (a 90-day journey led by the manager, supported by peers and measured by outcomes).

02 · THE JOURNEY

The 90-day journey at a glance

Five phases, each with a distinct purpose. The shift across the journey is from being welcomed, to learning, to contributing, to owning outcomes and growing.



PHASE	THE NEW HIRE SHOULD FEEL…	THE MANAGER'S CORE JOB	MILESTONE
Preboarding	Expected and excited	Prepare the welcome and the work	Pre-start call
Week 1	Welcomed and oriented	Be present; make connections	End-of-week reflection
Days 1–30	Confident in the basics	Teach context; define success	30-day check-in
Days 31–60	Useful and trusted	Delegate real work; give feedback	60-day check-in
Days 61–90	Invested in a future here	Hand over ownership; plan growth	90-day review

ROLES IN THE JOURNEY

Manager — owns the experience, sets expectations, coaches and holds the check-ins. **New hire** — co-owns the plan, asks questions, and shares feedback openly. **Buddy** — a peer guide for the unwritten rules and everyday questions. **HR / enablement** — provides structure, tools, systems access and measurement.

03 · PLAYBOOK

Phase-by-phase playbook

Use each phase as a working checklist — the goal is consistent behavior, not good intentions.

01

PHASE 1 · OFFER ACCEPT → DAY 1

Preboarding

Goal: Turn the gap between offer and start date into anticipation, and make sure Day 1 is ready.

MANAGER ACTIONS

- Send a personal welcome note within days of acceptance
- Confirm equipment, accounts and workspace are ordered
- Draft the first-week schedule and 30-60-90 outline
- Assign a buddy and tell the team who is joining

NEW-HIRE ACTIONS

- Complete paperwork and benefits enrollment
- Review any welcome materials shared
- Note questions and expectations for Day 1
- Share preferences: name, pronouns, working style

BUDDY / PEER ROLE

- Send a short, informal hello before Day 1
- Offer to answer practical questions (dress, parking, tools)
- Plan a coffee or lunch for Week 1

MILESTONE & CHECK-IN **Pre-start call** (15–20 min) in the week before Day 1: logistics, first-day plan, and a chance to ask anything.

02

PHASE 2 · DAYS 1-5

Week 1: Welcome

Goal: Create belonging and orientation. The new hire should end the week knowing people, purpose and priorities.

MANAGER ACTIONS

- Block time to be present on Day 1 — no back-to-back meetings
- Share the team's purpose, priorities and how work flows
- Schedule 5–8 key introductions across functions
- Agree 1:1 cadence and a small, scoped first task

NEW-HIRE ACTIONS

- Meet stakeholders and take notes on their priorities
- Set up tools and complete required training
- Start a running list of questions and observations
- Begin drafting their 30-60-90 plan with the manager

BUDDY / PEER ROLE

- Meet on Day 1 or 2; walk through tools and channels
- Explain team rituals and unwritten norms
- Check in daily for quick questions

MILESTONE & CHECK-IN **End-of-week reflection** (30 min): What surprised you? What is still unclear? What do you need next week?

03

PHASE 3 · DAYS 1-30

Learn

Goal: Build understanding of the business, customers, team and tools, and agree on what success looks like.

MANAGER ACTIONS

- Hold weekly 1:1s focused on learning and questions
- Finalize the 30-60-90 plan with measurable outcomes
- Share context: strategy, key metrics, past decisions
- Arrange shadowing; give early, specific feedback

NEW-HIRE ACTIONS

- Complete role-specific learning and shadowing
- Deliver a first early win, however small
- Map key stakeholders and how decisions get made
- Ask for feedback at least once a week

BUDDY / PEER ROLE

- Continue weekly touchpoints
- Share 'how things really work here' context
- Flag to the manager if the new hire seems stuck (with consent)

MILESTONE & CHECK-IN **30-day check-in:** review learning progress, confirm the plan, and ask how the experience compares to expectations set during hiring.

04

PHASE 4 · DAYS 31-60

Contribute

Goal: Shift from learning to delivering real work with growing independence and confidence.

MANAGER ACTIONS

- Delegate a meaningful project with clear scope
- Move feedback from encouragement to coaching
- Make the new hire's contributions visible to others
- Remove blockers; invite fresh-eyes observations

NEW-HIRE ACTIONS

- Own and deliver an agreed project or workstream
- Share one improvement idea based on fresh perspective
- Build relationships beyond the immediate team
- Self-assess progress against the 30-60-90 plan

BUDDY / PEER ROLE

- Shift to fortnightly check-ins
- Act as a sounding board for ideas before they go wider
- Introduce the new hire to their own network

MILESTONE & CHECK-IN **60-day check-in:** assess progress against goals, exchange two-way feedback, and adjust the plan for the final phase.

05

PHASE 5 · DAYS 61–90

Own & Grow

Goal: Hand over ownership of outcomes and connect the role to a future the new hire wants to invest in.

MANAGER ACTIONS

- Transition defined responsibilities to full ownership
- Discuss strengths, interests and development goals
- Co-create goals for the next quarter
- Recognize progress publicly and specifically

NEW-HIRE ACTIONS

- Own recurring responsibilities end to end
- Reflect on what has worked and what has not
- Draft a development plan and next-quarter goals
- Share onboarding feedback to improve the process

BUDDY / PEER ROLE

- Hold a closing conversation on the buddy relationship
- Encourage the new hire to become a future buddy
- Share feedback on the program with HR / enablement

MILESTONE & CHECK-IN **90-day review:** celebrate progress, confirm role fit, set next-quarter goals and agree a development plan. Onboarding formally closes; growth continues.

04 · TEMPLATE

Preboarding checklist

Work through this list between offer acceptance and Day 1. Assign an owner to each item so nothing falls between the manager, HR and IT.

WELCOME & CONNECTION

- ■ Personal welcome message from the manager
- ■ Team informed of start date and role
- ■ Buddy assigned and briefed
- ■ Pre-start call scheduled
- ■ Welcome materials shared (team overview, org chart)

THE WORK

- ■ First-week schedule drafted
- ■ 30-60-90 plan outline prepared
- ■ First small task identified
- ■ Key introductions booked in calendars

LOGISTICS & ACCESS

- ■ Paperwork and contracts completed
- ■ Laptop, equipment and workspace ready
- ■ Email, systems and tool accounts created
- ■ Building access or remote setup confirmed
- ■ Payroll and benefits enrollment initiated

MANAGER CALENDAR

- ■ Day 1 time blocked for the new hire
- ■ Weekly 1:1s set for the first 30 days
- ■ Day 30, 60 and 90 check-ins scheduled now
- ■ End-of-week-1 reflection booked

05 · TEMPLATE

Day-1 agenda

A sample structure for an in-office or remote first day. Adjust times to your context; protect the manager blocks and keep the afternoon light.

TIME	ACTIVITY	WHO	PURPOSE
9:00	Welcome & coffee with manager	Manager	Personal welcome; walk through the day
9:45	Workspace, equipment & tools setup	IT / Buddy	Remove friction early
10:45	Team purpose, priorities & ways of working	Manager	Context for the role
12:00	Team lunch (or virtual lunch)	Team	Informal connection
13:30	Buddy session: channels, rituals, norms	Buddy	The unwritten rules
14:30	Required training & self-guided reading	New hire	Foundational knowledge
15:30	Two short introductions with key partners	Partners	Start the network
16:30	End-of-day check-in	Manager	Questions, reactions, tomorrow's plan

05 · PEER SUPPORT

Buddy program quick guide

A buddy is a peer — not the manager — who helps the new hire navigate everyday questions and the unwritten rules of the team. A good buddy accelerates belonging. Managers: brief the buddy before Day 1 and treat buddy time as real work.

Who makes a good buddy

- Knows the team and its ways of working well
- Is approachable, patient and generous with time
- Is a peer, not in the new hire's reporting line
- Has the capacity to commit for 90 days

What a buddy does

- Explains tools, channels, rituals and norms
- Answers 'small' questions without judgment
- Makes introductions and includes the new hire
- Shares honest, helpful context about the culture

What a buddy does not do

- Evaluate performance or report on the new hire
- Replace the manager's coaching or 1:1s
- Share confidential information without consent
- Carry the onboarding load alone

Suggested rhythm

- Hello note before Day 1
- Daily touchpoints in Week 1
- Weekly through Day 30; fortnightly to Day 60
- Closing conversation around Day 90

06 · TEMPLATE

30-60-90 plan template

Co-create this plan in Week 1 and finalize it by Day 30. Keep it short, specific and visible to both the manager and the new hire. Replace the example prompts with your own content.

FOCUS AREA	DAYS 1–30 · LEARN	DAYS 31–60 · CONTRIBUTE	DAYS 61–90 · OWN & GROW
Priorities	Understand team goals, customers and core processes	Deliver an agreed project with increasing independence	Own recurring responsibilities end to end
Key outcomes	e.g., Complete core training; ship first early win	e.g., Project delivered; one improvement proposed	e.g., Next-quarter goals agreed and in progress
Relationships	Meet key stakeholders; map who decides what	Collaborate across at least one other team	Be a go-to contact for an area of the work
Learning	Tools, systems, product or service knowledge	Deepen role-specific skills through real work	Identify development goals for the next 6–12 months
Support needed	Shadowing, documentation, buddy time	Coaching feedback, unblocking, visibility	Stretch opportunity, development resources
Success looks like	Confident with the basics; clear on expectations	Trusted to deliver; feedback is acted on	Owns outcomes; sees a future in the role
Check-in	Day 30 conversation	Day 60 conversation	Day 90 review

TIPS FOR A PLAN THAT WORKS

- Write outcomes, not activities: 'Present the onboarding audit findings', not 'Learn about onboarding'.
- Limit each phase to three to five priorities so the plan stays focused.
- Let the new hire draft first; managers edit. Ownership starts with authorship.
- Review the plan at every 1:1 for two minutes — not just at the milestones.

New hire: _____ Manager: _____ Date: _____

07 · CONVERSATIONS

Manager check-in conversation prompts

Use these as a guide, not a script. Choose four or five prompts per conversation, listen more than you talk, and close each check-in with agreed next steps.

DAY 30

Learn & settle

- How does the role compare with what you expected when you accepted?
- What has been most energizing so far? Most confusing?
- Who has been most helpful? Who haven't you met yet that you should?
- Is it clear what success looks like at 60 and 90 days?
- What is one thing I could do differently to support you?
- Do you have everything you need — tools, access, information?

Close with: confirming the 30-60-90 plan and one support action you will take.

DAY 60

Contribute & adjust

- What are you most proud of so far?
- Where do you feel confident? Where would you like more support?
- What feedback have you received, and what have you done with it?
- Here is my feedback on your progress — what resonates?
- What have you noticed with fresh eyes that we should change?
- Do you feel part of the team? What would strengthen that?

Close with: adjusted priorities for Days 61–90 and one stretch opportunity.

DAY 90

Own & grow

- Looking back, what has gone well? What would you do differently?
- Which parts of the role do you enjoy most? Least?
- Where would you like to grow over the next 6–12 months?
- What would make you excited to still be here a year from now?
- What should we change about onboarding for the next person?
- How would you like to receive feedback and recognition going forward?

Close with: next-quarter goals, a development plan and your ongoing 1:1 rhythm.

Good check-in habits

- **Schedule all three before Day 1.** Check-ins that live on the calendar happen; those left to memory slip.
- **Ask, then pause.** Silence gives new hires room to raise what they might otherwise hold back.
- **Write down commitments** — yours and theirs — and open the next conversation by reviewing them.
- **Separate the check-in from performance evaluation.** The goal is support and alignment, not a rating.

08 · LISTENING

New-hire pulse survey questions

Send a short survey at the end of Week 1 and around Days 30, 60 and 90. Use a five-point agreement scale (Strongly disagree → Strongly agree) plus one or two open questions. Review responses with the manager and act on themes.

#	STATEMENT (RATE 1–5)	WHEN TO ASK
1	I understand what is expected of me in my role.	Week 1, 30, 60, 90
2	I have the tools, access and information I need to do my job.	Week 1, 30
3	I feel welcomed and included by my team.	Week 1, 30, 60, 90
4	My manager checks in with me regularly and supports my progress.	30, 60, 90
5	My buddy has been a helpful resource.	30, 60
6	I am receiving useful feedback on my work.	60, 90
7	The role matches what was described during hiring.	30, 90
8	I can see how I can grow and develop here.	60, 90
9	I would recommend this team as a place to work.	90
Open	What is one thing that would improve your experience right now?	Every pulse
Open	What has helped you most so far?	Every pulse

08 · MEASUREMENT

Metrics for onboarding success

Track a small set of measures consistently, review them each quarter, and set targets that reflect your own baseline and context.

METRIC	HOW TO MEASURE	WHY IT MATTERS
Time to productivity	Days until the new hire meets agreed role milestones (defined in the 30-60-90 plan)	Shows whether onboarding builds capability efficiently
90-day retention	Share of new hires still in role at Day 90, tracked by cohort and team	The clearest signal of early fit and experience
New-hire satisfaction	Average pulse-survey scores and themes at Week 1, Days 30, 60 and 90	Captures the experience while it can still be improved
Manager check-in completion	Share of Day 30, 60 and 90 conversations held on time	A leading indicator of manager-led onboarding

09 · EARLY WARNING

Warning signs of disengagement

Disengagement in the first 90 days is usually visible before it becomes a resignation. Watch for patterns, not single moments, and respond with curiosity rather than judgment.

WARNING SIGN	WHAT IT MAY MEAN	WHAT TO DO
Fewer questions; quieter in meetings	Uncertainty, low confidence or feeling unwelcome	Ask open questions 1:1; invite their view directly in a smaller setting
Missed or repeatedly rescheduled 1:1s	Overload, avoidance or a weak relationship	Protect the time; ask what format or cadence would be most useful
Comments that the role 'isn't what I expected'	A gap between hiring promises and reality	Explore the gap honestly; adjust scope where possible; be clear where not
Slow progress on the 30-60-90 plan	Unclear priorities, blockers or skills gaps	Revisit the plan together; remove blockers; add support or training
Limited connection with peers	Isolation, especially in remote or hybrid settings	Re-engage the buddy; create collaborative work and team moments
Low or declining pulse scores	Friction that has not yet been raised directly	Share themes, ask what would help, act visibly and follow up

The stay conversation: if you notice several signs, do not wait for the next milestone. Ask directly: "*What is going well, what is getting in the way, and what would make this role a great fit for you?*" Then agree one concrete change and follow up within a week.

RESPOND

A four-step response for managers

1. Notice
Look for patterns across a week or two, not a single bad day. Note what you have observed, factually.

2. Ask
Raise it privately and with curiosity: share what you have noticed and ask how things feel from their side.

3. Act
Agree one or two concrete changes — clearer priorities, more support, a new connection or a scope adjustment.

4. Follow up
Check back within a week. Show what changed and ask whether it is helping. Repeat until momentum returns.

Involve HR or enablement when concerns relate to wellbeing, conduct, accommodations or a mismatch between the role and what was offered — or when a new hire asks for a confidential conversation outside the reporting line.

10 · QUICK REFERENCE

Onboarding for retention on one page

PRE-DAY 1
Preboarding
- Welcome note
- Equipment & access ready
- Buddy assigned
- Check-ins scheduled
- Pre-start call

WEEK 1
Welcome
- Manager present Day 1
- Key introductions
- First small task
- 1:1 cadence agreed
- Week-1 reflection

DAYS 1-30
Learn
- Weekly 1:1s
- 30-60-90 plan final
- Context & shadowing
- Early win
- 30-day check-in

DAYS 31-60
Contribute
- Real project delegated
- Coaching feedback
- Visibility for work
- Fresh-eyes ideas
- 60-day check-in

DAYS 61-90
Own & Grow
- Full ownership
- Development goals
- Next-quarter plan
- Public recognition
- 90-day review

SIX PRINCIPLES
- Belonging comes before performance
- Clarity reduces anxiety
- Early wins build momentum
- The manager is the experience
- Growth must be visible from the start
- Listening closes the loop

TRACK FOUR METRICS
- Time to productivity
- 90-day retention
- New-hire satisfaction (pulse surveys)
- Manager check-in completion

WATCH FOR
- Fewer questions, quieter presence
- Missed 1:1s
- 'Not what I expected'
- Stalled plan progress
- Isolation from peers

MANAGER'S WEEKLY HABITS
- Hold the 1:1 — every week
- Review the 30-60-90 plan briefly
- Give one piece of specific feedback
- Make one useful introduction
- Ask: 'What do you need from me?'

Remember: onboarding is not complete when the paperwork is done. It is complete when the new hire can say, "*I know what is expected of me, I am contributing, I belong here, and I can see my future.*"