Shiftbase Template

30 - 60 - 90
onboarding checklist

About this template

This checklist is for SMEs that want onboarding to be consistent and actually useful — not just "here's your laptop."

Who it's for

- Managers onboarding a new hire
- HR/People Ops supporting onboarding
- Team leads responsible for ramp-up and performance

How to use it (10 minutes)

1. Copy this checklist per new hire (one checklist = one person).

2. Fill in the role-specific goals (30/60/90) before day 1.

3. Assign owners to tasks (manager, HR, IT, buddy).

4. Use it in weekly check-ins — if it isn't tracked, it won't happen.

30-60-90 onboarding checklist

Employee details

Employee name: [ ]

Role: [ ]

Start date: [ ]

Manager: [ ]

Buddy / mentor: [ ]

Location / team: [ ]

Day 0–7 (first week essentials)

Access + setup

- ☐ Contract signed / paperwork completed (Owner: HR)
- ☐ Tools/accounts created (email, systems, HR tools) (Owner: IT/HR)
- ☐ Equipment issued (if applicable) (Owner: IT/Office)
- ☐ Access to key docs + policies granted (Owner: HR)
- ☐ Schedule/time tracking setup confirmed (Owner: Manager/HR)

People + context

- ☐ Team intro + key stakeholders list shared (Owner: Manager)
- ☐ Buddy intro + first buddy session booked (Owner: Manager)
- ☐ "How we work" explained (communication, documentation, meetings) (Owner: Manager)
- ☐ Role expectations for first 30 days explained (Owner: Manager)

Training basics

- ☐ Product/company overview (Owner: Manager)
- ☐ Mandatory training completed (safety/privacy/code of conduct) (Owner: HR)
- ☐ Tool training completed (role tools) (Owner: Manager/Buddy)

First week check-in

- ☐ End-of-week check-in (what's clear/unclear, blockers) (Owner: Manager)

30 Days (ramp-up outcomes)

Role understanding + execution

- ☐ Role success metrics explained (Owner: Manager)
- ☐ First "real" deliverable completed (Owner: Employee)
- ☐ Work quality baseline agreed (Owner: Manager)
- ☐ Core processes learned (how decisions are made, approvals, documentation) (Owner: Manager)

Relationships

- ☐ Stakeholder introductions completed (Owner: Employee/Manager)
- ☐ Buddy sessions completed (at least 2) (Owner: Buddy)

Performance + support

- ☐ 30-day review (progress + gaps + support plan) (Owner: Manager)
- ☐ Training needs identified (Owner: Manager/Employee)
- ☐ Any access/process issues resolved (Owner: Manager/HR)

30-day outcomes (fill in)

- Outcome 1:
- Outcome 2:
- Outcome 3:

60 Days (ownership starts)

Execution + consistency

- ☐ Own a recurring task/process (Owner: Employee)
- ☐ Deliver work with minimal rework (Owner: Employee)
- ☐ Uses documentation habits consistently (Owner: Employee)

Feedback + improvement

- ☐ Midpoint feedback collected (Manager + 1–2 peers) (Owner: Manager)
- ☐ Improvement plan in place (if needed) (Owner: Manager)

60-day outcomes (fill in)

- Outcome 1:
- Outcome 2:
- Outcome 3:

90 Days (impact + autonomy)

Autonomy + impact

- ☐ Independently handles core responsibilities (Owner: Employee)
- ☐ Delivers measurable impact (Owner: Employee)
- ☐ Contributes to team improvement (process, quality, speed) (Owner: Employee)

Alignment

- ☐ 90-day review (go/no-go + growth plan) (Owner: Manager/HR)
- ☐ Next 90-day goals set (Owner: Manager/Employee)

90-day outcomes (fill in)

- Outcome 1:
- Outcome 2:
- Outcome 3:

➕ Add-ons

Optional, high value

Weekly check-in agenda (10 minutes)

- What went well?
- What's unclear?
- What's blocking you?
- What support do you need?
- What's the priority for next week?

Onboarding "definition of done"

Onboarding is done when the new hire can:

- Do the core job without daily help
- Explain how decisions and approvals work
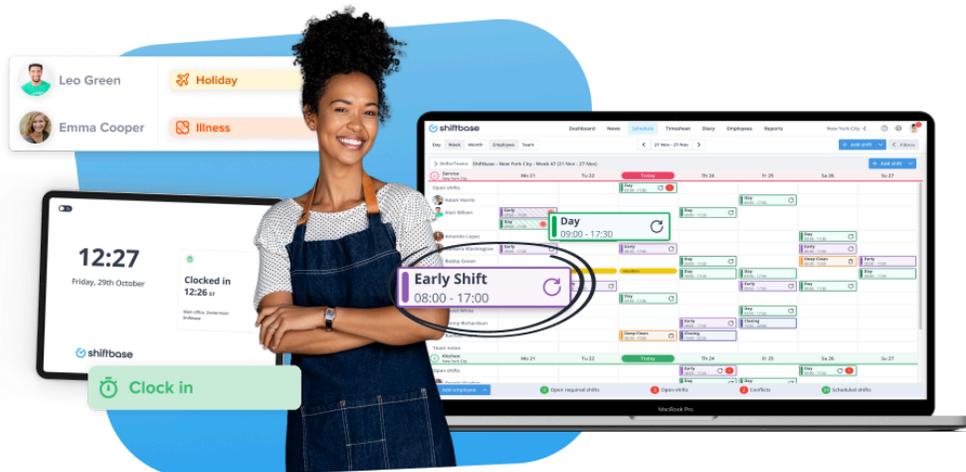- And hit agreed 90-day outcomes.

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