PEOPLE LEADER TOOLKIT

The Onboarding Playbook

The first 90 days of a new hire, minus the guesswork.

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You fought hard to win this candidate. Now you have about 90 days to prove they made the right call. Most new hires decide whether to stay long before their first review, and a lot of that decision gets made in week one.

HR can build the process. Only the people leader can make someone feel like they belong. **This is the checklist I wish every manager had taped to their desk.**

Onboarding starts when the offer is accepted and ends around day 90. Day 1 is the middle of the process.

The 90 days at a glance

Phase	The goal	The moment that matters
Pre-boarding	Keep them excited and ready	A personal call within 48 hours of the yes
Day 1	Make it feel like they were expected	You at the door, lunch with the team
Week 1	Learn the work, meet the people	Goals they helped write
Days 2 to 30	Build confidence	The 30-day check-in
Days 31 to 90	Hand over ownership	Something with their name on it

Page tags like **P. 8** point to a print-ready template at the back. Each one is a fillable PDF: type in the boxes and save, or print it and write. Swap in your company's tools and timelines. The structure holds either way.

PRE-BOARDING · WITHIN 48 HOURS OF ACCEPTANCE

Close the gap

The stretch between "yes" and Day 1 is where good hires quietly take a counteroffer. Silence reads as disorganization.

- ✓ **Call them yourself.** Congratulate them and tell them you're glad they said yes. Pick up the darn phone.
- ✓ **Launch the background check.** Standalone disclosure and written authorization first. HR
- ✓ **Schedule the drug screen**, if your company requires one. Give a clear deadline and location. HR
- ✓ **Confirm the start date, time, and location** in writing.
- ✓ **Send the new hire paperwork:** W-4, state withholding, direct deposit, emergency contact, handbook acknowledgment. HR
- ✓ **Send the Get to Know You form.** You'll use it for swag, lunch, and the team intro. **P. 8**
- ✓ **Tell the team** who's joining, what they'll do, and when they start.

PRE-BOARDING · ONE TO TWO WEEKS OUT

Build the first week

Everything they touch on Day 1 should already be waiting for them.

- ✓ **Order equipment and request access:** laptop, phone, email, software, badge, keys, and vehicle or tools if the role needs them. People Leader with IT
- ✓ **Assign the buddy** and send them the Buddy Guide. P. 9
- ✓ **Fill out Your First Week** with real meetings and real names. No blank afternoons. P. 10
- ✓ **Book the Day 1 lunch.** Check the form for dietary needs.
- ✓ **Order the Day 1 swag** in their sizes.
- ✓ **Pull the job description** and mark the parts that matter most in the first 90 days.
- ✓ **Draft the 30/60/90 Goal Plan.** Rough is fine. You'll finish them together in week one. P. 11
- ✓ **Fill out How I Lead** if you don't have one yet. P. 12

PRE-BOARDING · THE WEEK BEFORE

Answer the questions they're afraid to ask

What to wear, where to park, who to ask for, and whether lunch is covered.

- ✓ **Send the welcome email** with Your First Week attached. P. 6
- ✓ **Tell them what to wear, plainly.** "Business casual" means six different things to six different people. For field or safety-sensitive roles, spell out PPE, boots, and what the company provides.
- ✓ **Confirm the background check and drug screen cleared.** No one starts on a pending result without HR's sign-off.
- ✓ **Test their logins.** A laptop that isn't ready tells them "we forgot you were coming."
- ✓ **Set up the workspace** with the swag waiting on the desk.

DAY 1

Make it feel like they were expected

Nobody remembers the benefits presentation. They remember who met them at the door and who they ate lunch with.

- ✓ **Be there when they arrive.** Block your first hour. Plan the day on the Day 1 Agenda. P. 13
- ✓ **Hand over the swag.** Small cost, big signal.
- ✓ **Complete the I-9.** Section 1 by end of Day 1. Section 2 within three business days. HR
- ✓ **Walk the space:** restrooms, break room, exits, and where the good coffee is.
- ✓ **Hold the Meet the Team meeting.** 30 minutes. Each person shares their name, what they own, and one thing unrelated to work. Use the new hire's form answers to kick it off so they don't have to perform on the spot.
- ✓ **Take them to lunch** with the buddy and the team, on the company.
- ✓ **Walk through the job description** and what you need from them first.
- ✓ **Share your leadership style** and walk through How I Lead. P. 12
- ✓ **End-of-day check-in.** Fifteen minutes. "What questions came up today?"

WEEK 1

Learn the work, meet the people

By Friday they should know who to call, how the work gets done, and what you expect.

- ✓ **Check in daily** for 15 minutes. It drops to weekly after this.
- ✓ **Set the recurring weekly 1:1.** Same day, same time. Protect it.
- ✓ **Finalize the 30/60/90 goals together.** People commit to goals they helped write. P. 11
- ✓ **Set up three to five partner intros** with the people this role depends on.
- ✓ **Let them shadow the work** before you ask them to do it.
- ✓ **Complete required training** and flag the benefits enrollment deadline. HR
- ✓ **Give them one small, real win** they can finish by Friday.
- ✓ **Friday wrap-up:** What surprised you? What's still confusing? What do you need from me next week?

DAYS 2 TO 30

Build confidence

The welcome glow fades around week three. Replace it with progress they can see.

- ✓ **Hold the weekly 1:1 every week.** Cancel it and they'll assume they aren't a priority. They'll be right.
- ✓ **Hand over real work in growing doses,** starting with tasks that have a clear finish line.
- ✓ **Give feedback early and often.** Praise in the moment. Correct in private.
- ✓ **Ask the buddy and the new hire** how the pairing is going.
- ✓ **Close out the paperwork:** benefits, training, handbook, certifications. HR
- ✓ **Hold the 30-day check-in** using the Check-In Guide. P. 14

DAYS 31 TO 90

Hand over ownership

By day 90 they should be doing the job with less of you.

- ✓ **Give them something to own end to end:** a project, an account, or a process.
- ✓ **Shift your coaching** from "here's how" to "what would you do?"
- ✓ **Ask what they'd change.** Fresh eyes spot what the team stopped seeing. Act on at least one idea.
- ✓ **Raise concerns at day 45.** Waiting until day 89 is unfair to everyone.
- ✓ **Hold the 60-day check-in.** P. 14
- ✓ **Thank the buddy,** publicly. They did real work.
- ✓ **Hold the 90-day review,** set goals for the next six months, and talk about growth. Document it. P. 14
- ✓ **Ask for onboarding feedback.** What should you keep, cut, or add for the next hire?

Rookie mistakes to skip

- ✓ **Going quiet after the offer.** Two weeks of silence gives a recruiter plenty of time to call them back.
- ✓ **Handing Day 1 to HR.** HR covers the paperwork. The welcome belongs to the people leader.
- ✓ **The fire hose week.** Twelve trainings and no actual work leaves them tired and unsure what the job is.
- ✓ **Skipping 1:1s when things get busy.** Busy is exactly when they need them.
- ✓ **Saving a concern for the 90-day review.** By then it's a surprise, and surprises turn into disputes.

COMPLIANCE GUARDRAILS · CALL HR FIRST

Rules vary by state, city, and industry. Treat this as a starting checklist and confirm the details with HR or counsel for your footprint.

- **Background checks:** Use a standalone written disclosure and get written authorization before a third party runs a check. If a result might change the offer, follow the adverse action steps, including the pre-adverse notice and waiting period. Many states and cities have fair chance laws.
- **Drug screens:** Apply the policy the same way to everyone in the same role. State cannabis laws differ widely. DOT-regulated roles follow federal rules.
- **Form I-9:** Let the employee choose from the list of acceptable documents. Never ask for a specific document or more than the form requires. Don't complete it before the offer is accepted.
- **Payroll and notices:** Collect the W-4 and state forms before the first payroll. Report new hires to the state on time, and check whether your state requires a written pay notice at hire.
- **If it isn't working:** Call HR before the 90-day review. Document what you saw, what you coached, and how they responded.

Onboarding is the last step of recruiting. Treat it that way and you'll keep the people you worked so hard to hire.

USING THE TEMPLATES

The toolkit

Seven print-ready templates follow this section. Each one is a fillable PDF. Type in the boxes and save, or print it and write by hand. The company name at the top is fillable too.

Template	Who fills it out	When	Page
Get to Know You	New hire	Within 48 hours of acceptance	**8**
Buddy Guide	Buddy	One to two weeks out	**9**
Your First Week	People leader	Attach to the welcome email	**10**
30/60/90 Goal Plan	People leader and new hire	Draft before Day 1, finish in week one	**11**
How I Lead	People leader	Write once, share on Day 1	**12**
Day 1 Agenda	People leader	The week before Day 1	**13**
Check-In Guide	People leader	Days 30, 60, and 90	**14**

Get to Know You

Keep every question optional and the tone light. Don't add questions about age, family plans, health, or religion. You don't need the answers, and you don't want them in a file. Keep completed forms out of the personnel file.

Buddy Guide

Pick a peer who's good at the job, patient, and proud to work here. The buddy has no authority over the new hire. Fill in the names and start date before you hand it over.

Your First Week

Replace every block with a real meeting, a real name, and a real time. Here's a week that works for most roles:

Day	Focus	Key meetings
Monday	Welcome and setup	Meet the Team, team lunch, job description review
Tuesday	Systems and tools	IT setup, buddy walkthrough, first training block
Wednesday	The work itself	Shadowing, first two partner intros
Thursday	The business	More partner intros, finalize 30/60/90 goals
Friday	First win and reflection	Buddy coffee, Friday wrap-up with people leader

30/60/90 Goal Plan

Two or three goals per phase is plenty. Write goals you can see and measure. "Learn the system" is a hope. "Run the monthly report without help by day 30" is a goal.

How I Lead

Plain words, one page, updated every year. If you're stuck, here's the level of detail that works:

Prompt	Example answer
How I communicate	Text me if it's urgent. Email me if it can wait a day. I answer email by end of day.
What I value most	Tell me early when something is off track. Bad news gets worse with age.
How I give feedback	Small and often, in our weekly 1:1. Nothing in your review will be a surprise.
How decisions get made	If it's under $500 and inside your job, make the call. Above that, bring me a recommendation.
My pet peeves	Meetings with no agenda. Long emails that should have been a phone call.
How to disagree with me	Please do. Bring it to me directly, ideally before the decision is final.
What you can count on from me	I'll protect our 1:1, give you straight answers, and back you up in rooms you're not in.

The welcome email

Send it the week before Day 1, from your own email, signed with your own name. A note from HR confirms logistics. A note from the people leader confirms they want you there.

Subject: See you Monday, [Name]

Hi [Name],

The team and I are glad you're joining us. Here's everything you need for Monday.

- **Start time:** [8:30 a.m.]
- **Where:** [Address]. Park in [location] and ask for [name] at the front desk.
- **What to wear:** [Plain-language description, plus any PPE or boots for field roles]
- **Lunch:** On us. The team is taking you out.
- **Bring:** Your ID documents for the I-9. HR sent the list of acceptable options.

Your first-week calendar is attached so you know what's coming. Your buddy is [Name], and they'll reach out before Monday to say hello.

If anything comes up before then, call or text me at [number].

See you Monday,
[Your name]

Before you hit send: Your First Week is attached with real names and times. The buddy knows to reach out. The background check and drug screen are cleared. The front desk or site lead knows who's arriving and when.

Day 1 Agenda

Start and end the day with the new hire yourself. Here's a sample to adjust:

Time	What	Who
8:30	Welcome, swag, coffee, workspace	People leader
9:00	Paperwork and I-9	HR
10:00	Laptop, logins, systems tour	IT or buddy
11:00	Meet the Team	Whole team
12:00	Team lunch	People leader, buddy, team
1:30	Job description and How I Lead	People leader
2:30	Site walkthrough and safety basics	Buddy
3:30	Time to settle in and explore	New hire
4:15	End-of-day check-in	People leader

Meet the Team: Thirty minutes. Open with a few of the new hire's Get to Know You answers so they don't have to perform on the spot. Each teammate shares their name, what they own, how long they've been here, one thing unrelated to work, and one way they can help in the first month.

End-of-day check-in: Ask what questions came up, whether anything is missing for tomorrow, and how the day compared to what they expected. Then walk through tomorrow.

Check-In Guide

Ask, listen, and write it down. Close every check-in with your read against their 30/60/90 goals, using specific examples. "You're on track" is nice. "Your first two client calls went well, and here's what I'd tighten" is useful. If you have a real concern, call HR before the 90-day review.

Shared freely by Brent Morrell. Use it, adapt it, pass it along. This is general guidance, not legal advice. For specific situations, loop in your HR team or counsel. Views are my own and do not represent my employer, past or present.

COMPANY NAME

Get to Know You

Every question is optional. Answer what you like and skip the rest.

NAME _____ **START DATE** _____

Welcome aboard. We're glad you said yes. Your answers help us plan your first day and introduce you to the team.

What do you like to be called?

T-shirt or polo size?

Any food allergies or preferences for your Day 1 team lunch?

Favorite snack, coffee order, or go-to drink?

How do you like to be recognized? In front of the team, or one on one?

Best way to reach you: call, text, email, or chat?

What's something you're great at that wouldn't show up on a resume?

What do you do when you're not working?

What's one thing you want your new team to know about you?

Anything that would make your first day easier?

RETURN TO _____ **BY** _____

COMPANY NAME

Buddy Guide

For the teammate helping a new hire find their footing.

BUDDY _____ **NEW HIRE** _____

START DATE _____ **PEOPLE LEADER** _____

Your role

You were picked because you're good at the job and people trust you. For the next 90 days, you're the go-to person for the questions a new hire won't ask their boss. You have no authority over them and no evaluation to give. Your job is to make the first few months easier.

What to do and when

When	What to do	Done
Before Day 1	Send a short hello by text or email. Tell them you'll see them on Day 1.	☐
Day 1	Join the team lunch. Show them the space: restrooms, break room, exits, supplies.	☐
Week 1	Grab coffee or lunch at least once. Walk them through the tools the team actually uses.	☐
Days 2 to 30	Check in once a week. Ask what's confusing and what's going well.	☐
Days 31 to 90	Check in every other week. Introduce them to people outside the team.	☐

Share the unwritten rules

- ✓ Who to call for what, and who answers fastest.
- ✓ How meetings really run, and which ones matter most.
- ✓ Where files, forms, and supplies live.
- ✓ The team's shorthand, acronyms, and inside jokes.
- ✓ Anything you wish someone had told you in your first month.

When to loop in the people leader

Keep everyday questions between the two of you. Bring it to the people leader early if the new hire seems lost, stuck without tools or access, or unhappy enough to leave. Anything involving safety, harassment, or discrimination goes to the people leader or HR right away.

Notes

COMPANY NAME

Your First Week

Here's what's coming, so nothing surprises you.

NAME _____ **WEEK OF** _____

	Monday	Tuesday	Wednesday	Thursday	Friday
Focus					
Morning					
Midday					
Afternoon					
End of day					

Your key contacts

Role	Name	Best way to reach them
People leader		
Buddy		
HR		
IT help		

COMPANY NAME

30/60/90 Goal Plan

Completed together by the new hire and people leader in week one.

NEW HIRE _____ **PEOPLE LEADER** _____

ROLE _____ **START DATE** _____

First 30 days

Learn the systems, the people, and how work flows. Complete first tasks with support.

Goal	How we'll know it's done

Days 31 to 60

Learn the business and customers. Handle core duties with light check-ins. Own one project or process.

Goal	How we'll know it's done

Days 61 to 90

Do the full job independently. Deliver results against agreed measures.

Goal	How we'll know it's done

AGREED ON _____ **30-DAY CHECK-IN** _____

60-DAY CHECK-IN _____ **90-DAY REVIEW** _____

COMPANY NAME

How I Lead

How I work, what I value, and what you can count on from me.

NAME _____ **LAST UPDATED** _____

How I communicate

What I value most

How I give feedback

How decisions get made

My pet peeves

How to disagree with me

What you can count on from me

COMPANY NAME

Day 1 Agenda

The plan for the first day.

NEW HIRE _____ **DATE** _____

Time	What	Who	Location and notes

Ready for Day 1

- ☐ Laptop and logins tested
- ☐ Badge, keys, and access ready
- ☐ Workspace set up
- ☐ Swag on the desk
- ☐ Lunch booked
- ☐ Job description printed
- ☐ How I Lead printed
- ☐ Team knows the new hire is starting

Notes

COMPANY NAME

Check-In Guide

Conversations at days 30, 60, and 90.

NEW HIRE _____ **PEOPLE LEADER** _____

Day 30

DATE _____

Is the job what you expected when you said yes? What's different?

What's one thing that would make your work easier right now?

On a scale of 1 to 10, how confident do you feel? What would move it up two points?

Overall ☐ On track ☐ Needs support ☐ Concern

Next steps

Day 60

DATE _____

What are you proudest of so far?

Where are you still waiting on me or someone else?

What would you change about how the team works?

Overall ☐ On track ☐ Needs support ☐ Concern

Next steps

Day 90

DATE _____

Would you take this job again, knowing what you know now?

Where do you want to be in a year, and what skill would help most?

What should we keep, cut, or add to onboarding for the next hire?

Overall ☐ On track ☐ Needs support ☐ Concern

Next steps