Building an Onboarding Process That Sets New Hires Up for Success

The first 90 days set the tone for performance, confidence, connection, and retention.

Use this guide to build a consistent onboarding experience that prepares new hires with the information, tools, training, relationships, and expectations they need to succeed.

1. Prepare Before the First Day

A successful onboarding experience begins before the employee arrives. Preparation communicates professionalism and prevents a new hire from spending the first day waiting for access, equipment, or instructions.

- ☐ Confirm the start date, schedule, reporting location, and supervisor
- ☐ Send a welcome message with first-day expectations and key contacts
- ☐ Prepare the workspace, equipment, credentials, and system access
- ☐ Complete required employment documents and pre-employment steps
- ☐ Notify the immediate team and key partners that the new employee is starting
- ☐ Prepare a first-week schedule that balances orientation, training, and connection

TSG Tip: Create a repeatable pre-boarding checklist so the experience does not depend on a manager remembering every step.

2. Organize the Essential Documentation

New employees should know where to find the information that governs their work and what requires acknowledgment.

- ☐ Job description and clearly defined responsibilities
- ☐ Employee handbook and key organizational policies
- ☐ Confidentiality, technology, safety, and compliance expectations
- ☐ Benefits, payroll, timekeeping, leave, and attendance information
- ☐ Organizational chart and department contact information
- ☐ Standard operating procedures and role-specific reference materials

TSG Tip: Avoid overwhelming the employee with a stack of documents. Prioritize what is needed now and provide a clear location for materials they will reference later.

3. Make the First Day Intentional

The first day should answer three basic questions: Where do I belong? What is expected of me? Who can help me?

- ☐ Provide a personal welcome from the supervisor or team leader
- ☐ Explain the organization's mission, values, priorities, and customers or stakeholders
- ☐ Introduce immediate teammates and key cross-functional partners
- ☐ Tour the workplace or virtual systems employees will use regularly
- ☐ Review the employee's role, schedule, communication expectations, and immediate priorities
- ☐ Confirm access to required systems, files, equipment, and communication tools

TSG Tip: Do not make paperwork the entire first-day experience. Connection and clarity are equally important.

4. Build Role-Specific Training

Orientation explains the organization. Training teaches the employee how to perform the job. Strong onboarding requires both.

- ☐ Identify the critical tasks the employee must learn first
- ☐ Provide written procedures, examples, templates, and job aids where appropriate
- ☐ Demonstrate important systems and workflows before expecting independent use
- ☐ Assign practice opportunities and allow the employee to ask questions
- ☐ Clarify when approval, escalation, or supervisory support is required
- ☐ Document training completion for high-risk, regulated, or compliance-sensitive tasks

TSG Tip: Train in manageable phases. Employees retain information more effectively when they can learn, practice, receive feedback, and then build on the skill.

5. Clarify Performance Expectations Early

New hires should not have to guess what successful performance looks like.

- ☐ Define the employee's most important responsibilities and priorities
- ☐ Explain quality, timeliness, service, communication, and documentation expectations
- ☐ Identify measurable goals or early performance milestones
- ☐ Discuss decision-making authority and when to escalate concerns
- ☐ Explain how feedback and performance conversations will occur
- ☐ Connect individual responsibilities to department and organizational goals

TSG Tip: If expectations cannot be explained clearly, they will be difficult to evaluate consistently later.

6. Create Connection and Belonging

Employees need relationships as well as instructions. A new hire who knows where to go for help can become productive more quickly and navigate the culture with greater confidence.

- ☐ Assign a peer resource, buddy, or designated point of contact when appropriate
- ☐ Schedule introductions with people the employee will work with regularly
- ☐ Explain communication norms, meeting practices, and team expectations
- ☐ Include the employee in relevant team meetings and organizational activities
- ☐ Explain unwritten practices that are important to navigating the workplace
- ☐ Create opportunities for the employee to ask questions without embarrassment

TSG Tip: Do not assume culture is self-explanatory. Help new employees understand how the organization works, communicates, and makes decisions.

7. Use a 30-60-90 Day Roadmap

A simple roadmap keeps onboarding from ending after the first week and gives both the employee and manager a shared view of progress.

- ☐ First 30 Days: Learn the organization, role, systems, procedures, relationships, and immediate responsibilities
- ☐ Days 31-60: Increase independence, apply training, manage routine responsibilities, and address knowledge gaps
- ☐ Days 61-90: Demonstrate consistent performance, assume fuller ownership, and identify improvement or development opportunities
- ☐ Schedule formal check-ins at key milestones and document agreed next steps

TSG Tip: The roadmap should reflect the actual complexity of the role. Some positions require a longer ramp-up period, but every employee benefits from defined milestones.

8. Build in Manager Check-Ins and Feedback

Regular conversations allow leaders to correct misunderstandings before they become habits and give new employees a safe place to raise concerns.

- ☐ Schedule frequent check-ins during the first several weeks
- ☐ Ask what is clear, what remains confusing, and what resources are missing
- ☐ Provide specific feedback on performance instead of waiting for a formal review
- ☐ Review workload and priorities as responsibilities increase
- ☐ Ask for feedback on the onboarding process itself
- ☐ Document significant commitments, concerns, or support needs

TSG Tip: A strong question for every check-in is: “What do you need from me to be successful in this role?”

9. Measure Whether Onboarding Is Working

Onboarding should be reviewed as an operational process, not simply an HR event.

- ☐ Track completion of required orientation and training activities
- ☐ Review whether new hires receive system access and equipment on time
- ☐ Monitor early performance milestones and recurring training gaps
- ☐ Ask new hires for feedback at 30, 60, and 90 days
- ☐ Look for patterns in early turnover, confusion, or repeated manager interventions
- ☐ Update onboarding materials when roles, systems, policies, or processes change

TSG Tip: If multiple new hires struggle with the same issue, examine the onboarding process before assuming the problem is the employee.

Quick Onboarding Readiness Check

Before your next new hire starts, ask whether your organization can confidently answer “yes” to the following:

- ☐ We have a consistent pre-boarding process
- ☐ New hires receive required tools and system access on time
- ☐ Roles and performance expectations are clearly documented
- ☐ Training includes both organizational orientation and job-specific instruction
- ☐ Managers follow a defined 30-60-90 day onboarding plan
- ☐ New hires know who to contact when they need support
- ☐ We collect feedback and regularly improve the onboarding process

If several of these areas are inconsistent, undocumented, or dependent on individual managers, your organization may benefit from a more structured onboarding review.

READY TO BUILD A STRONGER ONBOARDING EXPERIENCE?

Tiered Solutions Group helps organizations strengthen onboarding workflows, clarify responsibilities, organize training, and build practical systems that support new-hire success.

Smarter Systems. Stronger Organizations. Lasting Impact.

Schedule an Onboarding Process Assessment