

New Hire Onboarding Template

A 90-day plan for managers, HR, IT and the new hire

This template gives everyone involved in onboarding one shared plan for a new hire's first 90 days. Fill in the new hire's details, check the owner and due date for each task, and tick items off as you go.

Delete the tasks that don't apply to your company and add your own. Due dates are shown as days relative to the start date, so "-7" means one week before day one.

Tip: Every grey box in this PDF is fillable. Click a box to type, and tick the checkboxes as tasks are done. Save a copy for each new hire so you keep a record of their onboarding.

New hire details

New hire name

Job title

Department

Manager

Onboarding buddy

HR contact

Start date

Work location (office / remote / hybrid)

Work email

Probation end date

Before day one

Get paperwork, equipment and accounts ready early so day one can focus on meeting people.

Done	Task	Owner	When	Due date
☐	Send the signed offer letter and confirm the start date	HR	14 days before	
☐	Collect tax, payroll and right-to-work paperwork	HR	10 days before	
☐	Order the laptop, monitor and accessories	IT	10 days before	
☐	Assign an onboarding buddy	Manager	7 days before	
☐	Create email, Microsoft 365 and Teams accounts	IT	5 days before	
☐	Draft the new hire's 30-60-90 day plan	Manager	5 days before	
☐	Grant access to the tools the role needs	IT	3 days before	
☐	Prepare the desk or ship equipment to remote hires	IT	3 days before	
☐	Book first-week meetings in the new hire's calendar	Manager	3 days before	
☐	Send a welcome email with day one logistics	Manager	3 days before	
☐	Tell the team who's joining and when	Manager	4 days before	
☐				
☐				

Day one

Keep it light. By the end of the day, the new hire should have a working laptop and know who to ask for help.

Done	Task	Owner	When	Due date
☐	Welcome meeting with the manager	Manager	Day one	
☐	Set up the laptop and sign in to every account	IT	Day one	
☐	Office tour or virtual team introduction	Buddy	Day one	
☐	Lunch or virtual coffee with the team	Buddy	Day one	
☐	Walk through the first week schedule	Manager	Day one	
☐	Read the employee handbook and key policies	New hire	Day one	
☐	End-of-day check-in for questions	Manager	Day one	
☐				
☐				

First week

Build context about the team and what good work looks like in this role.

Done	Task	Owner	When	Due date
☐	Review team goals and how the role contributes to them	Manager	Day 2	
☐	Shadow a teammate on a live project	Buddy	Day 3	
☐	Complete required compliance training	New hire	Day 4	
☐	Meet each team member for a short 1:1	New hire	Day 4	
☐	Agree on 30-60-90 day goals	Manager	Day 4	
☐	First weekly 1:1 with the manager	Manager	Day 4	
☐	Send the week one feedback survey	HR	Day 4	
☐				
☐				

Days 8 to 30

Learn the role and deliver a first small win.

Done	Task	Owner	When	Due date
☐	Complete role-specific training	New hire	Day 21	
☐	Meet key stakeholders outside the team	New hire	Day 21	
☐	Confirm benefits enrollment	HR	Day 30	
☐	Deliver a first small project or quick win	New hire	Day 30	
☐	30-day check-in and feedback conversation	Manager	Day 30	
☐				
☐				

Days 31 to 60

Start contributing with less hand-holding.

Done	Task	Owner	When	Due date
☐	Share feedback on the onboarding experience so far	New hire	Day 45	
☐	Take ownership of recurring responsibilities	New hire	Day 60	
☐	60-day check-in and goal review	Manager	Day 60	
☐				
☐				

Days 61 to 90

Work independently and set goals for the next quarter.

Done	Task	Owner	When	Due date
☐	Work independently on core responsibilities	New hire	Day 90	
☐	Set goals for the next quarter	Manager	Day 90	
☐	90-day review and probation decision	Manager	Day 90	
☐	Send the final onboarding survey	HR	Day 90	
☐				
☐				

Day one schedule

Adjust the times and activities to fit your company. Share this with the new hire before they arrive.

Time	Activity
9:00	Arrive, welcome and coffee with the manager
9:30	Laptop setup and account sign-in with IT
10:30	Team introductions
11:30	Tour of the office or the tools you'll use daily
12:30	Lunch with the team or buddy
14:00	Handbook, policies and benefits overview with HR
15:00	First week schedule and 30-60-90 plan walkthrough
16:30	End-of-day check-in

30-60-90 day plan

Agree on these goals together during week one, then revisit them at each check-in.

First 30 days

Focus: Learn

Understand the team, the product, customers and how work gets done.

Goals

How we'll measure success

Days 31 to 60

Focus: Contribute

Take on real work with support and start owning smaller pieces.

Goals

How we'll measure success

Days 61 to 90

Focus: Own

Run core responsibilities independently and set goals for what's next.

Goals

How we'll measure success

Check-in notes

Use these questions as a starting point for each conversation.

- What's been easier or harder than you expected?
- Do you have the access, tools and information you need?
- Which goals are on track, and where do you need support?
- What's one thing we could improve about onboarding?

End of week one

Date

End of week two

Date

Day 30

Date

Day 60

Date

Day 90

Date

People to meet

Fill in names during preboarding so the new hire knows who to ask from day one.

Role	Name	Why talk to them	Met
Manager		Goals, priorities and weekly 1:1s	☐
Onboarding buddy		Day-to-day questions and unwritten rules	☐
HR contact		Payroll, benefits and policies	☐
IT support		Accounts, access and equipment	☐
Skip-level manager		Wider context on the team's goals	☐
			☐
			☐

Sign-off

Complete at the 90-day review to confirm onboarding is finished.

Name	Role	Signature	Date
	New hire		
	Manager		
	HR		

Run this plan inside Microsoft Teams

Teamflect lets you assign onboarding tasks, schedule recurring 1:1s and track 30-60-90 day goals without leaving Microsoft Teams. See how it works at teamflect.com.