

Making Effective Onboarding Checklists

Employers can simultaneously support newcomer hires and allow for agency by using a phased onboarding plan that mixes supported learning (coaching, shadowing, check-ins) with clearly defined windows for job performance.

30-60-90 Day Structure:

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Days 1-30: Focus on orientation, reviewing and understanding relevant policies and processes, and guided learning through shadowing, walkthroughs, and small tasks; this also includes being available and making it comfortable to address lots of questions.

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Days 31-60: Focus on supervised application where the new employee starts owning specific tasks in “draft mode.” Review and provide clear feedback to ensure understanding.

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Days 61-90: Shift to autonomy and impact where the employee can run their own tasks and projects, with the employer providing frequent check-ins and coaching rather than step-by-step instructions.

**Don't assume newcomers will “find time” to self-learn.
Carve out calendar time and make it official.**

By making learning explicit in a written plan, employers can give newcomers clarity about when to expect more support and when they'll be expected to experiment and take initiative.



Sample Checklist for an **Employee:**

This checklist is designed around the behaviours and performance of a newcomer learning a new process.

- ☐ Is capable of correctly using the specified software or tool on their own from beginning to end without skipping critical steps.
- ☐ Can explain the process aloud or in writing, including purpose, key risks, decision-making authority, and when to escalate.
- ☐ Completes a practice scenario and produces the expected output (like a report/email/entry) using the correct format.
- ☐ Identifies one improvement or question about the process after trying it.
- ☐ Correctly applies policy in a sample scenario and asks clarifying questions before acting.

Sample Checklist for an Employer:

This checklist is designed around preparation and support actions that enable the employee to demonstrate learning.

- Prepared specific tasks or scenarios where the employee can apply skills, not just hear about them.
- Asked open questions that prompt the employee to explain, decide, or reflect (not just listen), and provided prompt and constructive feedback.
- Gave the employee time and space to practice tasks independently before stepping in.
- Identified one improvement or question about the process after trying it.
- Clarified goals for this period (e.g., 30-60-90 days) and how success will be measured.
- Made expectations and role responsibilities explicit, including cultural/workplace norms.
- Checked in on how the employee is feeling about workload, learning balance, and autonomy.
- Used practical examples, role plays, or simulations rather than only verbal explanations.

Sources: www.australiancurriculum.edu.au/resources/formative-assessment/designing-formative-assessment/checklists | fhwaapps.fhwa.dot.gov/nhit/LearnersFirst/assessment-checklists.htm | resources.workable.com/tutorial/30-60-90-day-onboarding-plan | www.in.gov/spd/trainingopportunities/files/Mentor-Checklist.pdf | www.hr.eng.cam.ac.uk/system/files/documents/Mentoring2.pdf

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