THE PEOPLE PLAYBOOK · SOP 2 OF 4

# Onboarding

Book Two of the People Playbook for [FIRM NAME]

| | |
|---|---|
| **Document Owner** | [PEOPLE LEAD] |
| **Approved By** | [APPROVER] |
| **Applies To** | All employees of [FIRM NAME] |
| **Version** | 1.0 |
| **Effective Date** | |
| **Next Scheduled Review** | |

*Part of The Law Firm Operating System Implementation Workbook*

# Contents

# 1. How to Use This Standardized Operating Procedure (SOP)

This is Book Two of the People Playbook, the four documents that run people at [FIRM NAME] from the first job ad to the last day.

| Book | Covers | Ends At |
|---|---|---|
| **Book One: Recruiting and Hiring** | Requisition through signed offer. | The signed conditional offer and a cleared background check. |
| **Book Two: Onboarding** | Signed offer through Day 90. | The Day 90 decision. |
| **Book Three: Developing** | Day 91 onward. | Continuous. Runs for as long as the person is employed. |
| **Book Four: Retaining** | Engagement, compensation cadence, turnover, and separations. | Continuous. |

Exit surveys consistently name onboarding as the thing employees would change, and they name it two and three years after they were onboarded. Whatever happens in the first days leaves an impression that lasts for years, so this document treats the first ninety days as the highest-leverage period in the employment relationship.

## 1.1 Before You Use It: Customize These Six Things

| Placeholder | Replace With |
|---|---|
| **[FIRM NAME]** | Your firm's name as it appears publicly. |
| **[PEOPLE LEAD]** | Whoever owns the people system end to end. In a smaller firm this is the office manager, firm administrator, or Chief Operating Officer (COO). One name, not a committee. |
| **[ONBOARDING OWNER]** | The person accountable that every step in this document happens. Often the same as [PEOPLE LEAD]. In a larger firm, a delegate. |
| **[MANAGER]** | The new hire's direct supervisor, the one person they report to. |
| **[BUDDY]** | The peer assigned to each new hire. Section 5.6 sets the selection rule. |
| **[APPROVER]** | Owner, managing partner, or COO. Signs the Day 90 decision. |

### This Is a Template, Not Legal Advice

Onboarding touches Form I-9, state wage notices, benefits eligibility, handbook acknowledgments, and confidentiality agreements. All of these vary by jurisdiction and all of them change. Section 13 flags the ones carrying hard deadlines.

Have employment counsel licensed in your state review this document, your handbook, and your new-hire packet before first use, and re-review annually.

## 2. Roles and Responsibilities

| Role | Owns | Does Not Own |
|---|---|---|
| **[ONBOARDING OWNER]** | That every step in this document happens, on time, for every hire. The cohort calendar. The pre-arrival checklist. Scheduling the leader presentations, the reviews, and the lunches. Chasing the equipment order. Holding the file. | Judging performance. The owner runs the process. The manager judges the person. |
| **[MANAGER]** | The hire's competence and integration. The Day 1 first hour. The role-specific training plan. Week One check-ins. The 30-, 60-, and 90-day reviews. The Day 90 recommendation. | Logistics. A manager chasing a laptop order is a manager not training. |
| **[BUDDY]** | Being the person the new hire can ask anything without it being an evaluation. Lunches in Week One. Answering the questions nobody thinks to cover. | Training, supervising, or reporting on the new hire. See Section 5.6. |
| **Department Leaders** | Delivering an orientation presentation in Days 1 through 3 so the hire understands what every department does. | Anything else in this process. |
| **[APPROVER]** | Signing the Day 90 decision. Funding the program: equipment, cards, lunches, and the non-productive first two weeks. | Day-to-day execution. |
| **Payroll and HR Administration** | Form I-9 within the legal deadline, state wage notices, benefits enrollment, and personnel and confidential file setup. | The onboarding experience. |

# 3. Employee Standards

Before the first hire walks in, the firm needs written standards: the minimum expectations that apply to everyone, non-negotiable, applied the same way to every person in the building. Different standards for different employees create the feeling of favoritism, and there is nothing worse than being judged on a standard you did not know existed.

## 3.1 Building the Standards

1. **Define Core Values and Principles.** Consistent with the foundation the firm has already set. Involve leadership. These become the reference point for every specific standard, and they appear in both hiring and training.
2. **Align Standards with Firm Goals.** Every standard traces to a strategic goal. If the goal is client service, the standards name what that looks like: responding promptly, addressing concerns professionally, going the extra mile.
3. **Develop Clear and Measurable Standards.** "Maintain a positive attitude" fails the test. "Demonstrate a positive and respectful attitude in all interactions with colleagues and clients, even in challenging situations" passes it. Every standard needs a way to assess whether it is being met. Punctuality measured at 95% or better is a standard. Punctuality is a hope.
4. **Ensure Standards Are Realistic and Achievable.** Account for the training, technology, and time the person has. Standards set too high produce frustration, burnout, and lower morale.
5. **Communicate Standards Clearly.** Handbook, intranet, and training sessions, with examples and scenarios rather than the bare rule. Leaders model them first. Leaders may dissent in private, but they advocate in public.
6. **Reinforce Through Training and Development.** Ongoing rather than one-time, and tailored by role. On-the-job training, mentoring, and coaching all count.
7. **Monitor Compliance and Address Gaps.** Reviews, audits, and feedback. When someone falls short, diagnose before disciplining. The fix may be training, coaching, or workload, and if the gap is comprehension then the communication failed rather than the person.

Creating employee standards is not a one-time task. Revisit them on the same annual cycle as this document.

## 3.2 Standards Are Not Key Performance Indicators (KPIs)

Standards govern behavior. KPIs govern performance. Hitting the numbers does not excuse behaving outside the standard, and a firm that tolerates the trade will find its standards are decorative within a year. KPIs are built in the Developing SOP. Standards are what every new hire is taught in Days 1 and 2.

### One Decision to Make Before You Publish

Leadership decides what the standards are. Employees are asked only whether they are achievable with the tools and time available.

That split keeps ownership of the bar at the top while surfacing the feasibility problems that only the floor can see. Write down which reading your firm uses so the standard is applied consistently.

# 4. The Onboarding Program at a Glance

## 4.1 Cohort Start Dates

New hires start in groups, on the first and third Monday of every month. Everyone hired in that window starts together, learns together, and has a peer group from the first hour. The cost is a wait of up to two weeks between acceptance and start. The return is a new hire who knows three people by lunch on Day 1.

| Question | How to Handle It |
|---|---|
| **A candidate can start sooner and wants to** | Hold the date unless the seat is genuinely urgent. The two-week wait buys the cohort. Use the gap for pre-boarding contact, a message a week at minimum. |
| **The cohort is one person** | Run it anyway. A cohort of one still gets the leader presentations, the buddy, and the lunches. What it loses is the peer group, so lean harder on the buddy. |
| **The hire is genuinely urgent** | Start them off-cycle and attach them to the next cohort for the culture and policy days. Note the exception in the file so it stays an exception. |
| **The firm hires four people a year** | Move to one start date a month, or run cohorts quarterly and use the off-cycle process above. Abandon the frequency rather than the structure. |

## 4.2 The Two-Week Program

For roughly two weeks the new employee barely does the job. That is deliberate. The first two days are culture and relationships, the next three are policies and procedures, and the second week is spent shadowing someone doing the actual work.

| When | Focus | What Happens |
|---|---|---|
| **Days 1 to 2** | Culture and Relationships | Vision, mission, values, and service standards. Employee standards. Department leader presentations. Buddy introduction. Lunch out. Home at 3:00. |
| **Days 3 to 5** | Policies and Procedures | The handbook, the systems, and the way work moves through the firm. Continued leader presentations. Home at 3:00 on Day 3. |
| **Days 6 to 10** | Shadowing | Sitting with an experienced colleague doing the job. Watching before doing. |
| **Days 11 to 30** | Doing, Supervised | Real work with close support and frequent correction. The 30-day review closes this stage. |
| **Days 31 to 60** | Doing, With Range | Wider scope, longer leash, deeper training. The 60-day review closes this stage. |
| **Days 61 to 90** | Contributing | Operating at or near standard. The Day 90 review and decision close the program. |

New hires go home at 3:00 on the first three days. It looks indulgent and it is not. A new job is exhausting in a way that has nothing to do with the work, and the first three days are when a person decides how they feel about the place. Sending them home early is a cheap, memorable signal that the firm is not going to grind them.

## 4.3 The Review Schedule

| Review | Owner | The Question It Answers |
|---|---|---|
| **Day 30** | [MANAGER] | Are they learning at the rate we need, and do they know where they stand? |
| **Day 60** | [MANAGER] | Is this going to work? This is the last review at which a correction is still cheap. |
| **Day 90** | [MANAGER] and [APPROVER] | Are they delivering value, and what are we building toward next? |

# 5. Pre-Arrival Preparation

Everything in this section happens before the new hire arrives.

## 5.1 The Announcement

- Goes to the entire firm rather than just the department.
- Includes a photo and a name. Ask for the photo in the offer-acceptance message so you have it in time.
- Sent by [ONBOARDING OWNER] at least three business days before the start date.
- Says what they will own, who they will work with, and one human thing about them.

The point is that a new employee walks in already recognized. Someone joining a meeting on their first morning and being greeted by name has had a materially better start than someone introducing themselves eleven times.

## 5.2 The Workspace

- Desk, computer, phone, and any other equipment set up and tested before arrival. Working before arrival, not ordered before arrival.
- Remote and hybrid hires get their tools shipped and tested the same way.
- System access provisioned: email, case management, document platform, phone, and building access.

## 5.3 Business Cards

Order 100 to 150 cards at offer acceptance and ship them without a photo. A new attorney who spends sixty days with nothing to hand a referral source has been told, accurately, that the firm's convenience outranks their effectiveness. Reprint later if you want the photo on them.

## 5.4 Paperwork

Tax forms, agreements, benefits enrollment, and the handbook acknowledgment are prepared in advance and sent electronically before Day 1, so the new hire completes them on their own time. Day 1 is not for forms.

### What Cannot Be Pre-Completed

**Form I-9 runs on two clocks.** The employee completes Section 1 no later than their first day of employment. It may be done any time after they accept the offer, but not later than Day 1. The employee then presents acceptable documents and the employer completes Section 2 within three business days of the first day of employment. Never request or specify documents before hire.

Several states require a wage notice at hire, and some require it signed and retained. Confirm yours.

E-sign everything that can be signed in advance, and reserve a short scheduled block on Day 1 for the I-9 and any wet-signature items. Give the hire a checklist of what to bring.

## 5.5 The Orientation Schedule and Leader Presentations

Six to nine short presentations across the first three days, two or three per day. Each department leader covers what their department does, how it connects to the new hire's work, and who to call about what. Build the deck once and reuse it every cohort. The leader's job is to deliver it, not to rebuild it.

## 5.6 The Buddy

Every new hire is assigned a buddy on Day 1: a peer in or near their department who takes them to lunch, answers the questions nobody thinks to cover, and gives them somebody to ask before they ask the manager.

### Four Rules for the Buddy Role

**The buddy is never the new hire's supervisor.** The whole value of the role is being the person you can ask a foolish question without it going on your record. If the buddy is also the evaluator, that value disappears on Day 1 and the role becomes decorative.

**The relationship runs the full ninety days**, not one day. Weekly contact after Week One at minimum.

**The lunch budget is a published number**, not something the buddy pays and hopes to expense.

**The buddy is briefed for fifteen minutes** before the start date on what the role involves and what they are being asked to do. See Appendix C.

## 5.7 Pre-Arrival Checklist

[ONBOARDING OWNER] completes every line before the start date. The blank form is Appendix A.

1. Start date confirmed against the cohort calendar and the offer letter.
2. Announcement drafted, photo obtained, scheduled to send three business days out.
3. Workspace set up and tested. Equipment working, not merely ordered.
4. System access provisioned and credentials ready.
5. Business cards ordered, 100 to 150, no photo required.
6. Paperwork sent electronically with a completion deadline before Day 1.
7. Form I-9 block scheduled on Day 1 and the document checklist sent to the hire.
8. Buddy named, briefed, and told the lunch budget.
9. Leader presentation slots booked for Days 1 through 3.
10. Day 1 and Week One schedules built and sent to the new hire in advance.
11. Lunch reservations made for the first three days, with rotating attendees.
12. The 30-, 60-, and 90-day reviews already on [MANAGER]'s calendar.

# 6. Day One

Run it to a schedule and give the new hire a copy in advance so they are not guessing.

## 6.1 Day One Agenda

| Time | Block | What Happens |
|---|---|---|
| **9:00 to 10:00** | The Manager, In Person | [MANAGER] spends the first hour personally. Not HR, not the buddy, and not delegated. Welcome, the plan for the next two weeks, and a walk through the Role Scorecard out loud so the person knows exactly what they are measured on. |
| **10:00 to 10:30** | Buddy Introduction and Tour | The buddy takes over. Space, kitchen, bathrooms, where people sit, how the coffee works. |
| **10:30 to 11:15** | Culture | Vision, mission, values, and service standards. Not a slide read aloud, but the story of why the firm exists. |
| **11:15 to 12:00** | Employee Standards | The non-negotiables from Section 3, with examples. This is where you prevent someone being judged later on a standard they never saw. |
| **12:00 to 1:30** | Lunch Out | Buddy plus two or three colleagues. The firm pays. |
| **1:30 to 2:15** | Leader Presentations | Two or three department leaders, short. |
| **2:15 to 2:45** | Form I-9 and Signatures | Short, scheduled, done. |
| **2:45 to 3:00** | Close With the Manager | What surprised you? What do you need tomorrow? Then home. |

Home at 3:00 on Days 1, 2, and 3. Put it in the schedule so nobody has to ask.

# 7. Week One

The purpose of Week One is confidence first and competence second, in that order. Three components carry it.

## 7.1 Role-Specific Training

Not everyone learns the same way, so build the training in several forms: hands-on work, shadowing an experienced colleague, written material, and online modules. Confirm the new hire understands each concept before moving to the next.

**Make the Mastery Gate Real**

"Confirm they understand before you move on" is the right instruction with nothing attached to it, and without a mechanism it collapses into the trainer's impression. That is how people arrive at Day 30 with holes nobody noticed.

Give every training module a one-line completion test: a task performed unaided, a document produced clean, a call handled and reviewed. The trainer initials and dates it on the training plan in Appendix D. It takes ten seconds per module and turns a good intention into a record.

## 7.2 Clear Expectations

Set expectations for performance including key deliverables, deadlines, and the measures of success, and name the floor explicitly. It would be devastating to believe you were doing well only to discover you had never hit the minimum.

The subtler trap is assumed knowledge. Firms rely on a common-sense approach to leadership without noticing that much of what is common sense to a five-year employee is invisible to a five-day one. Assume nothing is obvious.

## 7.3 Regular Check-Ins

Daily in Week One, ten minutes, run by [MANAGER]. Progress, questions, and feedback. The purpose is as much emotional as operational, because a new hire who has not landed socially will leave regardless of how the work is going. Three questions worth asking:

- What is confusing that you have not asked about yet?
- Who have you met, and who have you not met that you need to?
- What did you expect this week that has not happened?

## 7.4 Lunches

Out to lunch at least three days running, with the buddy plus rotating colleagues. Employees who make friends at work are the ones who stay through the hard stretches, and Week One is when those friendships are cheapest to start.

# 8. Month One

## 8.1 Weeks Two Through Four

The stretch between Week One and the 30-day review is where onboarding quietly stops happening. Three standing contacts prevent it.

- **[MANAGER] holds a scheduled 30-minute one-on-one weekly.** Standing agenda: what you did, what got stuck, what you learned, what you need.
- **[BUDDY] checks in informally at least weekly.**
- **[ONBOARDING OWNER] contacts the hire once in Week Three**, independent of the manager. A five-minute call asking whether the program is being delivered as promised. This is how you find out onboarding is decaying while it is still fixable.

## 8.2 Continued Training

Compress the majority of training into Month One. Three months would be better and almost no firm can afford it, so run Month One off a written training plan with modules, owners, and dates rather than a vague intention to teach as you go.

## 8.3 Building Relationships

Fostering relationships among employees is leadership's responsibility rather than the new hire's. Five things are worth teaching explicitly rather than hoping for:

- How to communicate here.
- How to get along.
- How to collaborate.
- How to disagree respectfully.
- How to give feedback and how to receive it.

Team meetings, firm events, and any employee groups you run are the vehicles.

## 8.4 Train Them to Receive Feedback

Reviews arrive at 30, 60, and 90 days, and many employees are not accustomed to being told they are doing something wrong. Teach the mechanics before the first review: what a review is for, what the sheet looks like, what "areas for improvement" means here, and that critical feedback is a normal operating condition rather than a warning shot.

## 8.5 The 30-Day Review

A formal review covering progress, strengths, and areas for improvement, benchmarked against the expectations set during onboarding. Use the sheet in Appendix E.

| Section | What Gets Said |
| --- | --- |
| **Training Completed** | Which modules are signed off, which are outstanding, and whether the plan is on schedule. |
| **What Is Going Well** | Specific and evidenced. Start here. |

| Section | What Gets Said |
|---|---|
| **Where They Are Behind** | Behaviors and outcomes rather than traits. Compared to the expectations set in Week One rather than to a tenured employee. |
| **Relationships** | Who they have connected with. A hire who has made no connections by Day 30 is a retention risk regardless of their work. |
| **What They Need** | Their answer, not the manager's guess. |
| **Agreed Actions to Day 60** | Written, specific, and dated. |

# 9. The 60-Day Review

Day 60 is the last point at which a correction is still cheap. At Day 30 it is too early to judge. At Day 90 the decision is effectively made and everyone in the room knows it. Day 60 is where a firm can still change the outcome by fixing training, changing the manager, adjusting the workload, or starting a redeployment conversation.

## 9.1 What the 60-Day Review Covers

1. **Progress against the Day 30 agreed actions.** Every one, by name, marked done or not done.
2. **Where they stand against the Day 90 outcome.** Say the number out loud. If the Day 90 expectation will not be met on the current trajectory, this is the meeting where that gets said plainly.
3. **Training gaps.** Anything unsigned on the plan, and what specifically is being done about it in the next thirty days.
4. **The manager's own contribution.** An honest look at whether the firm held up its end: training delivered, questions answered, tools provided.
5. **A direct question about fit, asked of them.** Is this job what you expected? What is different? A hire who is quietly disappointed at Day 60 resigns at Day 120 unless somebody asks.

### The Three Outcomes of a 60-Day Review

**On Track.** Continue, with the Day 90 expectations confirmed in writing.

**Off Track, Correctable.** Name the gap, name the cause, and put a written plan on it with weekly checkpoints for the next thirty days. Say explicitly that this is a correction, so nobody is surprised at Day 90.

**Wrong Seat.** Rare, and better named at Day 60 than at Day 90. Move to the redeployment process in the Developing SOP. Someone failing in one seat is frequently excellent in another, and firms miss it because nobody is looking.

# 10. Day 90

A properly onboarded employee is delivering significant value by Day 90. This is the point at which most hires become profitable, and the review is built to establish whether that has happened.

## 10.1 The Comprehensive Review

| Section | What Gets Assessed |
|---|---|
| **Performance Against the Day 90 Outcome** | The number from the Role Scorecard. Met, partially met, or not met. |
| **Integration Into the Team** | How they work with others, and how others experience working with them. Gather two or three colleague inputs before the meeting. |
| **Standards and Culture** | Whether they are operating inside the employee standards from Section 3. Assessed separately from output. |
| **Ongoing Challenges** | What is still hard, and what support would change it. |
| **Achievements** | Named specifically, for the celebration in Section 10.3. |

## 10.2 Setting Long-Term Goals

The Day 90 review turns forward with three questions, asked directly:

**ASK** *"What do you want in one year?"*

**ASK** *"What do you want in three years?"*

**ASK** *"What do you want in five years?"*

Career, not just role. The output is a roadmap for growth aligned with where the firm is going, and it becomes the opening input to the Developing SOP. One of the surest ways to get long-term commitment from an employee is to commit to the employee long-term, and that starts with knowing what they want.

## 10.3 Celebrate

Recognize what they accomplished in ninety days, publicly. Firms that never mark an accomplishment teach their people that they are a number, and they teach it early.

## 10.4 The Day 90 Decision

[MANAGER] recommends and [APPROVER] signs. One of four outcomes, in writing, in the file.

| Outcome | What It Means and What Happens Next |
|---|---|
| **Confirm** | Delivering value and inside the standards. Move to the Developing SOP. The next review is the semiannual cycle. |
| **Confirm With a Development Focus** | Delivering, with one identified gap. Confirmed, and the gap becomes the first entry in their development plan under the Developing SOP. Most hires land here and that is healthy. |
| **Extend** | Not yet at standard, but the cause is identifiable and fixable: a training gap the firm caused, an unusually complex ramp, or a long absence. Extend by a defined period, typically 30 to 60 days, with |

| Outcome | What It Means and What Happens Next |
|---|---|
| | written criteria and weekly checkpoints. Extend once. A second extension is a decision nobody is willing to make. |
| **Do Not Confirm** | Not at standard and not on a path to it. Before acting, run the second look required by the Developing SOP: check the subjective assessment against the objective results, and ask whether this person belongs in a different seat rather than outside the firm. Document the sequence. Involve counsel before any separation. |

### Answer These Before You Decide

Did they receive the training this document promised, on schedule, signed off?

Did they have a manager who held the check-ins and the 30- and 60-day reviews on time?

Were the expectations written down and communicated in Week One, or are we judging them against a standard they never saw?

Did anyone tell them at Day 60 that this was off track?

**If the answer to any of these is no, the firm failed the hire.** The honest outcome is Extend, with the firm's own failure named in the record.

## 11. Handoff to Developing

Within five business days of the Day 90 review, [MANAGER] and [ONBOARDING OWNER] pass the following into the Developing SOP.

1. The signed Day 90 decision.
2. The one-, three-, and five-year goals from Section 10.2, in the employee's own words.
3. The role's three objective and three subjective KPIs, confirmed or drafted. The Developing SOP builds these, and the Day 90 review is the natural moment to set them.
4. Any development focus identified at Day 90.
5. The completed training plan, with anything outstanding flagged.
6. The employee's own answer to what would make the next ninety days better than the last.

Then close the loop backward. Send the Day 90 outcome to whoever ran the hire under the Recruiting SOP and record it against that document's 90-day retention KPI. A hire who fails at Day 90 is either a selection failure or an onboarding failure, and the only way to learn which is to tell both systems what happened.

# 12. Onboarding Key Performance Indicators (KPIs)

Five numbers, reviewed monthly by [PEOPLE LEAD] and reported quarterly to [APPROVER].

| KPI | How to Calculate It | Target | What It Tells You |
|---|---|---|---|
| **90-Day Retention** | New hires still employed at Day 90 divided by hires reaching Day 90 in the period. | 95% or better | The headline number. A failure is either selection or onboarding, and the Day 90 decision record tells you which. |
| **12-Month Retention** | New hires still employed at month 12 divided by hires reaching month 12. | 85% or better | Whether onboarding built something durable or just a good first fortnight. |
| **Program Completion Rate** | Pre-arrival checklist items completed on time divided by total items, averaged across hires. | 100% | The most actionable number here. Onboarding decays through skipped steps rather than bad intentions. |
| **Reviews Held On Time** | The 30-, 60-, and 90-day reviews held within three business days of the due date, divided by reviews due. | 100% | A missed 60-day review is the single most common point of failure in this document. |
| **Time to Productivity** | Days until the hire meets the Day 90 outcome on their Role Scorecard. | 90 days or fewer | Connects onboarding quality to firm capacity, and tests the Day 90 profitability assumption. |

### Ask Every New Hire One Question at Day 90

"What would you change about your first ninety days?" Asked before they are confirmed, and logged.

Employees name onboarding as the thing they would fix two and three years after the fact. Ask at Day 90 and you get the same information while it is still specific, still fresh, and still cheap to act on.

# 13. Compliance Notes

These are the onboarding steps carrying hard deadlines or real exposure. Confirm each with counsel licensed in your state.

| Area | The Standard to Hold |
|---|---|
| **Form I-9** | Two clocks. The employee completes Section 1 no later than the first day of employment. The employee presents acceptable documents and the employer completes Section 2 within three business days of the first day. Never request documents before hire and never specify which documents the employee must present. Store Form I-9 separately from the personnel file. |
| **E-Verify** | Several states mandate it above a size threshold. Confirm whether yours does. |
| **State Wage Notices** | Several states require a written wage notice at hire with specified content, and some require it signed and retained. Prepare it alongside the offer letter. |
| **Benefits Eligibility** | Confirm eligibility dates with your carrier or broker before stating them to the hire. Plan documents govern. |
| **Handbook Acknowledgment** | Signed and filed, and re-acknowledged on any material revision. |
| **Confidentiality and Conflicts** | Executed before access to client files rather than after. For licensed roles, run the conflicts check before the start date. |
| **Training Records** | Keep the completed training plan. If a performance dispute arises, the record that the firm delivered the training matters as much as the record that the employee received it. |
| **Accommodations** | If a new hire requests an accommodation for any part of onboarding, grant what is reasonable and never ask about the underlying condition. Keep medical and accommodation records in a separate confidential file. |
| **Documentation** | Every review, every agreed action, and every extension, in writing, in the file, at the time. A firm that has to explain a separation and has written nothing down has already lost the argument. |

# 14. Appendices

## Appendix A: Pre-Arrival Checklist

| | |
|---|---|
| **New Hire** | |
| **Role and Manager** | |
| **Cohort Start Date** | |
| **Buddy Assigned** | |

| Item | Done | Date |
|---|---|---|
| Start date confirmed against the cohort calendar | | |
| Announcement drafted, photo obtained, send scheduled | | |
| Workspace set up and tested | | |
| System access provisioned | | |
| Business cards ordered, 100 to 150 | | |
| Paperwork sent electronically with a deadline | | |
| Form I-9 block scheduled on Day 1, document list sent | | |
| Buddy named, briefed, lunch budget stated | | |
| Leader presentations booked for Days 1 to 3 | | |
| Day 1 and Week One schedules sent to the hire | | |
| Lunches booked for the first three days | | |
| The 30-, 60-, and 90-day reviews on the manager's calendar | | |

## Appendix B: Day One Schedule

Fill in names and times, and send it to the new hire two business days before they start.

| Time | Block | Who |
|---|---|---|
| | First hour with the manager | |

| Time | Block | Who |
|---|---|---|
| | Buddy introduction and tour | |
| | Culture: vision, mission, values, service standards | |
| | Employee standards | |
| | Lunch out | |
| | Leader presentations | |
| | Form I-9 and signatures | |
| | Close with the manager, home at 3:00 | |

## Appendix C: Buddy Brief

Fifteen minutes with [ONBOARDING OWNER] before the start date. Hand the buddy this page.

- **You are not their supervisor and you do not report on them.** You are the person they can ask anything.
- **Your commitment is ninety days**, not one day. Weekly contact at minimum after Week One.
- **Week One:** lunch out three days running, with rotating colleagues. The budget is $______ per person.
- **Cover what nobody else will:** where people eat, how meetings really run, who to ask about what, and which questions are normal to ask twice.
- **Tell [ONBOARDING OWNER] if something is wrong.** Not the content of private conversations, but the fact that the new hire is struggling, isolated, or has been left alone.

Buddy name and date briefed

## Appendix D: 90-Day Training Plan

Built by [MANAGER] before Day 1. Each module gets a completion test and the trainer initials it.

| Module | Method | Target Date | Completion Test Met | Trainer Initials |
|---|---|---|---|---|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

| Module | Method | Target Date | Completion Test Met | Trainer Initials |
|---|---|---|---|---|
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| | | | | |
| | | | | |

**Method:** hands-on, shadowing, online module, written material, or one-to-one instruction. Vary it, because not everyone learns the same way.

## Appendix E: 30, 60, and 90 Day Review Sheet

One sheet per review. The same form all three times, so progress is visible across them.

| | |
|---|---|
| **Employee and Role** | |
| **Review (30 / 60 / 90)** | |
| **Manager and Date** | |

| Section | Notes |
|---|---|
| **Training completed and outstanding** | |
| **What is going well, specific and evidenced** | |
| **Where they are behind: behaviors and outcomes, not traits** | |
| **Relationships and integration** | |
| **What they need from us** | |
| **Their own view: what is different from what they expected?** | |
| **Agreed actions before the next review, with dates** | |

**Day 60 outcome:** On Track / Off Track, Correctable / Wrong Seat

**Day 90 outcome:** Confirm / Confirm With Development Focus / Extend / Do Not Confirm

Employee signature and date

Manager signature and date

Approver signature and date (Day 90 only)

## Appendix F: Day 90 Goals and Handoff

| Prompt | In the Employee's Own Words |
|---|---|
| **What do you want in one year?** | |
| **What do you want in three years?** | |
| **What do you want in five years?** | |
| **What would have made your first ninety days better?** | |

| Handoff Item | Status |
|---|---|
| **Signed Day 90 decision** | |
| **Three objective KPIs confirmed or drafted** | |
| **Three subjective KPIs confirmed or drafted** | |
| **Development focus identified** | |
| **Training plan closed out** | |
| **Outcome reported back to the Recruiting SOP 90-day retention KPI** | |

## Appendix G: Cohort Calendar

Start dates for the year, published internally so hiring managers plan against it.

| Month | First Start Date | Second Start Date | Names in the Cohort |
|---|---|---|---|
| **January** | | | |
| **February** | | | |

| Month | First Start Date | Second Start Date | Names in the Cohort |
|---|---|---|---|
| **March** | | | |
| **April** | | | |
| **May** | | | |
| **June** | | | |
| **July** | | | |
| **August** | | | |
| **September** | | | |
| **October** | | | |
| **November** | | | |
| **December** | | | |

### Document Control

Owner: [PEOPLE LEAD] · Approver: [APPROVER] · Version: 1.0 · Effective: _____________ · Next review: _____________

Review after every third cohort and at least annually. The Day 90 question in Section 12 is what feeds those revisions.

**The People Playbook:** Book One Recruiting and Hiring · **Book Two Onboarding** · Book Three Developing · Book Four Retaining.