

# Onboarding and Early Success Planner

Toolkit 2, Chapter 1 Downloadable Tool    CIIS Employer HR Resources



**Purpose:** Create a structured onboarding experience, clarify early expectations, and support employee success during the first 90 days.

**How to use:** Work through each section before and during the employee's first 90 days. Add notes as you go.

| 1. Before the Employee Starts                                                         | Response / Notes |
|---------------------------------------------------------------------------------------|------------------|
| Confirm equipment, systems access, workspace, schedule, and manager responsibilities. |                  |
| Prepare welcome message and first-week agenda.                                        |                  |
| Identify key contacts and team introductions.                                         |                  |
| 2. First Week                                                                         | Response / Notes |
| Review role expectations, communication norms, and immediate priorities.              |                  |
| Schedule manager check-ins and training sessions.                                     |                  |
| Confirm whether the employee has questions or missing resources.                      |                  |
| 3. 30-60-90 Day Plan                                                                  | Response / Notes |
| Define learning goals for the first 30 days.                                          |                  |
| Identify increasing responsibilities for days 31 to 60.                               |                  |
| Confirm success measures and development needs by day 90.                             |                  |