Departmental Onboarding Playbook

A Manager's Guide to Creating an Exceptional New Hire Experience

Practical tools and strategies for successful departmental onboarding post-HR Orientation

Human Resources

Purpose of the playbook

This playbook empowers managers to build a consistent, engaging, and customizable onboarding experience for every new team member, picking up where HR Orientation leaves off. It is designed as a flexible framework, not a rigid checklist, so you can adapt it to your department's pace, and needs.

Trust **Respect** **Accountability** **Collaboration** **Integrity** **Impact**

Guiding Principles

One Team

Every new hire deserves a warm, intentional welcome.

Clarity Over Complexity

Clear expectations reduce anxiety and accelerate performance.

Connection Drives Engagement

Relationships built early are the #1 predictor of engagement.

Flexibility Within Structure

Use this framework as a starting point, not a script.



Manager vs. HR: Who owns what?

Collaboration ensures a seamless new hire journey. Both managers and HR play distinct, complementary roles in delivering an exceptional onboarding experience.

Manager Responsibilities

- Team integration & introductions
- Role-specific training & shadowing
- Culture building & team norms
- Setting clear goals & expectations
- Weekly check-ins & feedback
- Assigning a buddy or mentor
- Reviewing 30/60/90-day milestones

HR Responsibilities

- New hire orientation & compliance
- Benefits enrollment & administration
- Policy and legal documentation
- System access & onboarding tools
- Background checks & credentialing
- HR system setup & recordkeeping
- Ongoing policy guidance & support

***When in doubt, managers own everything that happens after the employee walks out of HR Orientation.*

Departmental Onboarding Framework

Each phase builds confidence, connection, and capability.



Pre-Arrival

- Workspace setup
- System Access
- Welcome Communication



First Day

- Team Introductions
- Office Tour
- Role Overview



First Week

- Stakeholder Meetings
- Assigned Buddy
- Role Training



First 30 Days

- Job Shadowing
- Role Specific Learning
- Early Assignments



Days 31-60

- Increased Ownership
- Cross Team Collaboration
- Coaching



Days 61-90

- Independence
- Performance Conversations
- Development Planning

A purpose-led 90-day new hire journey: each phase builds on the last.

Phase Deep Dive: What to Do and When

Pre-Arrival

- Send a personalized welcome email (template in Toolkit)
- Announce the new hire to the team
- Assign an onboarding buddy
- Confirm workspace, laptop, and system access are ready
- Block your calendar for Day 1 welcome meeting
- Share first-week schedule in advance

First Day

- Begin with a manager welcome — don't delegate Day 1
- Office or virtual tour with buddy
- Team lunch or virtual coffee chat
- Walk through the 30-60-90 plan together
- End with a "How was Day 1?" debrief

First Week

- Set up stakeholder introduction meetings
- Confirm all system and tool access
- Walk through team workflows and communication norms
- Review the department training matrix
- End-of-week reflection conversation



Days 31-90

- Day 30: Review goals, gather feedback, adjust plan
- Day 60: Assess contributions, celebrate wins, refine priorities
- Day 90: Formal integration review, transition to standard performance cycle

The 30-60-90 check-ins are the most critical touchpoints. Never skip them, even if things seem to be going well.

Manager Best Practices

A consolidated toolkit for onboarding every new hire with intention, clarity, and connection.

01

Build Relationships & Psychological Safety

- Communicate openly and listen actively
- Schedule regular 1:1 touchpoints
- Introduce the new hire to key colleagues
- Celebrate early wins
- Encourage questions and value every voice
- Normalize learning and respond with curiosity

> *There are no bad questions here.*

02

Set Clear Expectations & Facilitate Knowledge Transfer

- Define 30/60/90-day goals
- Clarify role scope, decision-making authority, team norms, and performance standards
- Review the job description together
- Share documented processes and introduce tools and systems
- Use job shadowing and hands-on training
- Assign a peer buddy

> *Clarity from day one accelerates performance.*

03

Enable Cross-Functional Networking, Check-Ins & Feedback

- Introduce key contacts across departments
- Schedule cross-functional meetings in weeks 1-2
- Share org charts and team overviews
- Hold weekly check-ins to remove blockers and support confidence
- Use a structured 30-day feedback conversation
- Give timely, constructive, two-way feedback and coaching

> *Regular manager check-ins are the highest-impact onboarding activity.*

Creating Your Departmental Onboarding Plan

The best onboarding plans are built with the new hire, not handed to them. Co-creation drives ownership.

Welcome & Team Introductions

Every new hire receives a formal welcome from their manager on Day 1.

Onboarding Buddy

A peer assigned for the first 60 days to answer informal questions.

Formal Check-ins at 30/60/90

Structured conversations using the provided conversation guides.

30-60-90 Day Plan

A written plan co-created with the new hire during the first week.

Training Matrix Completion

All required department training completed within the first 30 days.

Required Elements & Tailored Guidance

Every onboarding plan must include core required elements, but the best plans are thoughtfully tailored to the individual, the role, and the team.

Required Elements

- Role-specific training & job responsibilities
- Compliance & policy review
- Culture immersion & team norms
- Systems & tools access and orientation
- Performance expectations & 30/60/90 goals
- Key stakeholder introductions
- "Tailor, don't reinvent: build on the required foundation."

Customization Tips

- Department-specific needs
- Align activities to team workflows and priorities unique to your department.
- New hire background
- Adjust depth of training based on experience level and prior knowledge.
- Team size & dynamics
- Scale check-ins and integration activities to fit your team structure.
- Role complexity
- Extend timelines for highly technical or cross-functional roles as needed.

HOW DO YOU DO YOUR ROLE?

A repeatable method liaisons use to train any role — even one they've never done

The Liaison isn't expected to be a subject-matter expert in every role. They're the process expert who makes sure every role gets taught the same reliable way — regardless of department.

1 Map the Role with the Manager

Before Day 1, the Liaison facilitates a short conversation with the hiring manager (or a team SME) to break the role into 5–7 core tasks. The Liaison doesn't generate this content — they make sure it happens.

2 Show → Do → Review

For each core task: the manager or SME demonstrates it once, the new hire does it with support, then the two review it together. The Liaison protects this rhythm — the content stays with whoever knows the job.

3 Document Once, Reuse Always

The first time a task is taught, it gets written down as a short job aid. Over time this builds real department documentation instead of re-teaching the same task from scratch with every new hire.

4 Verify With Teach-Back

At Day 30 and 60, the new hire explains or demonstrates the task back in their own words. If they can teach it, they've learned it — this is the real test, not whether a checklist box got checked.

The Liaison's job is to make sure every task gets taught this way — not to already know every task themselves.

Sample: Onboarding Journey: first 90 days

Week 1
Orientation

Team Meetings
System setup
role overview

Days 8-30
Training matrix

stakeholder meetings
first solo work
day 30 check-in

Days 31-60
project ownership

Cross-Functional networking
feedback sessions
day 60 check-in

Days 61-90
Full Contribution

performance review prep
Goal refinement
day 90 integration review

This sample journey is a starting point. Adjust milestones based on your team's complexity, the new hire's prior experience, and your department's current workload. The phases should feel progressive, each stage builds confidence before adding new responsibility.

MANAGER & LIAISON TOOLKIT

What's in the toolkit: six items every manager and Liaison can open on Day 1

New Hire Onboarding Checklist

Phase-by-phase tasks, Pre-Arrival through Day 90: including the equipment request (2–3 wk lead time) and the ET & Admin Services follow-up for badge and system access.

Role Knowledge Map Worksheet

The Liaison and manager break the role into 5–7 core tasks before Day 1: the input to the Show → Do → Review method on the previous slide.

30-60-90 Day Plan Template

Co-created with the new hire in Week 1, not handed to them — covering goals, performance expectations, and team alignment.

Manager's Personal Welcome Email

Sent separately from HR's official welcome email, introduces the team, role priorities, and what to expect in Week 1.

Weekly Check-In & Documentation Guide

How to log 1:1s and 30/60/90 check-ins in PerformYard; tied to the Day 45 prompt that prepares the Day 90 review.

Support Contacts

Direct lines for ET & Admin Services, Recruiting, HR general support, and the HR Business Partner for performance or conflict issues.

Every item here maps to a template already named in the Planning Templates & Checklists Dashboard — this slide shows managers and Liaisons what's inside each one.

Planning Templates & Checklists Dashboard



PLANNING TEMPLATES

- ✦ 30-60-90 Day Onboarding Plan Template
- ✦ Role-Specific Training Schedule Template
- ✦ New Hire Welcome Agenda Template

PLANNING TEMPLATES (cont.)

- ✦ Departmental Orientation Checklist Template
- ✦ Onboarding Goals & Milestones Worksheet

Start with Planning Templates to set a strong foundation

MANAGER CHECKLISTS

- ✦ Pre-Arrival Preparation Checklist
- ✦ First Day & First Week Activities Checklist
- ✦ 30-Day Integration & Check-In Checklist

MANAGER CHECKLISTS (cont.)

- ✦ 60-Day Performance & Feedback Checklist
- ✦ 90-Day Onboarding Completion Checklist

Use Checklists to stay on track at every phase

Employee Experience & Communication Templates

- Employee Experience Resources: Welcome Journey Map · 30-60-90 Day Experience Guide · New Hire Feedback Survey · Buddy Program Framework · Cultural Integration Checklist
- Communication Templates: Welcome Email · Week 1 Check-In Message · 30-Day Touchpoint Script · Announcement to Team Template
- Engage new hires with structured communication and support — consistent touchpoints build confidence, belonging, and early momentum for long-term retention.
- Best Practice: Send the welcome email 3–5 days before start date. Use the buddy program framework to pair new hires with a peer guide from day one.



Tracking Tools & Reference Resources

- 90-Day Progress Tracker — Monitor new hire milestones, task completion, and check-in status across the full onboarding journey at a glance.
- Onboarding Scorecard — Evaluate new hire readiness and manager effectiveness using structured rating criteria at 30, 60, and 90 days.
- Check-In Log Template — Document weekly touchpoints, discussion topics, action items, and follow-ups to maintain consistent engagement records.
- SHRM & Deloitte Onboarding Research — Access curated best practice guides, industry benchmarks, and frameworks to continuously improve your onboarding approach.

