bevel & sloane

FIELD MANUAL SERIES
B&S-R03

90 DAYS

FREE PLAYBOOK

WORKFORCE ENABLEMENT · FIELD MANUAL 03

THE 30/60/90 ONBOARDING *Playbook*

A week by week ramp plan for any frontline or operations role, with checklists for the manager and the buddy, and three checkpoint conversations.

1. How the playbook works
2. Days 1 to 30: Learn
3. Days 31 to 90: Contribute, Own
4. Manager and buddy checklists

DOCUMENT	VERSION	ISSUED	FORMAT
B&S-R03	1.0	November 2026	Playbook

HOW IT WORKS

THREE PHASES, THREE ROLES

Most onboarding is a calendar of meetings followed by "shadow whoever has time." This playbook replaces that with a planned ramp: each week has a focus, a job for the new hire, a job for the people supporting them, and a proof point you can check on Friday.

DAYS 1 TO 30

Learn

Understand the work, the tools and the people. Complete core tasks with support.

DAYS 31 TO 60

Contribute

Carry a growing workload with lighter review. Handle exceptions using the SOPs.

DAYS 61 TO 90

Own

Run the full role to standard. Improve one process and teach it back.

ROLE	OWNS
Manager	The plan, the targets, the three checkpoint conversations, and clearing blockers.
Buddy	Daily questions, live demonstrations, reviewing early work. A peer, not the manager.
New hire	Logging questions, practicing, asking for review, flagging SOP gaps they find.

12%

of employees strongly agree their organization does a great job onboarding new employees.

Gallup, 2018.

PLAN SETUP

ROLE _____ NEW HIRE _____

MANAGER _____ BUDDY _____

START DATE _____ DAY 30 / 60 / 90 DATES _____

WHAT "FULLY PRODUCTIVE" MEANS FOR THIS ROLE, IN ONE SENTENCE _____

PHASE 01 · DAYS 1 TO 30

LEARN THE WORK

The goal of month one is confidence, not output. By Day 30 the new hire can complete the core task of the role to standard with someone checking.

WEEK	FOCUS	NEW HIRE DOES	MANAGER AND BUDDY DO	PROOF BY FRIDAY
Wk 1	**Orientation**	Gets access to every system. Meets the team and key partners. Watches the buddy run the core workflow at least twice. Reads the five most used SOPs.	Manager sets 30 day goals in writing. Buddy books a daily 15 minute check in for two weeks.	Can explain what the team delivers, for whom, and what good looks like.
Wk 2	**Guided practice**	Runs the core task with the buddy watching. Keeps a running question log. Takes a short knowledge check.	Buddy demonstrates, then watches, then reviews. Manager reviews the question log.	One core task completed with buddy sign off.
Wk 3	**Supervised reps**	Handles low risk live work. Uses SOPs before asking. Notes any step that does not match the document.	Buddy reviews work daily. Manager joins one review to calibrate standards.	Three tasks completed to standard with review.
Wk 4	**First ownership**	Owns a small, defined workload. Prepares for the Day 30 checkpoint with a short self assessment.	Manager runs the Day 30 checkpoint and confirms or resets 60 day goals.	Day 30 checkpoint held and notes recorded.

DAY 30 CHECKPOINT

○ On track ○ Needs support ○ Off track

Can they complete the core task to standard with review? What questions keep repeating, and which SOP should have answered them? What do they need from you next month?

PHASE 02 · DAYS 31 TO 60

CONTRIBUTE

Month two adds range and removes training wheels. Review moves from daily to every other day, then weekly. The new hire starts finding the cracks in your documentation, which is useful.

WEEK	FOCUS	NEW HIRE DOES	MANAGER AND BUDDY DO	PROOF BY FRIDAY
Wk 5	**Second workflow**	Learns the next most common workflow using the same watch, do, review pattern.	Buddy demonstrates the new workflow. Review drops to every other day on the first one.	Second workflow completed once with sign off.
Wk 6	**Exceptions**	Handles edge cases using the SOPs. Logs any exception the SOP does not cover.	Buddy walks through the three most common exceptions. Manager reviews the gap log.	Two exceptions resolved without escalation.
Wk 7	**Handoffs**	Works a full handoff with another team. Meets partner roles in sales, operations or delivery.	Manager introduces partner leads and clarifies what "done" means at each handoff.	One clean handoff with no rework.
Wk 8	**Interim target**	Works toward the 60 day output target. Prepares a self assessment for Day 60.	Manager runs the Day 60 checkpoint and sets the 90 day target.	Interim target met or a plan to close the gap.

DAY 60 CHECKPOINT

☐ On track ☐ Needs support ☐ Off track

Are they hitting the interim target with weekly review only? Which exceptions still need help? What SOP gaps have they found, and who will fix them?

PHASE 03 · DAYS 61 TO 90

OWN THE ROLE

Month three is about independence. The new hire carries the full workload at the normal level of review, improves one thing, and shows they can teach it.

WEEK	FOCUS	NEW HIRE DOES	MANAGER AND BUDDY DO	PROOF BY FRIDAY
Wk 9	**Full workload**	Carries the full standard workload at normal review levels.	Buddy steps back to on request support. Manager moves to the standard one to one rhythm.	Full week of work at normal review.
Wk 10	**Improve one thing**	Proposes one fix to an SOP, template or handoff, based on what they found.	Manager approves or redirects the fix and names the SOP owner.	Written proposal submitted.
Wk 11	**Teach it back**	Walks a peer or the next new hire through one process.	Buddy observes and gives feedback on clarity.	One teach back completed.
Wk 12	**Full target**	Hits the full output and quality target for the role.	Manager confirms results against the role definition from setup.	Full target met for the week.
Wk 13	**Day 90 review**	Completes a self assessment and drafts a six month development goal.	Manager runs the Day 90 checkpoint and closes the onboarding plan.	Onboarding formally closed.

DAY 90 CHECKPOINT

☐ On track ☐ Needs support ☐ Off track

Are they fully productive by the definition you wrote on page 02? What should the next six months focus on? What would you change in this plan for the next hire?

CHECKLISTS

MANAGER AND BUDDY CHECKLISTS

MANAGER OWNS THE PLAN

BEFORE DAY 1

- [ ] Accounts, hardware and system access requested and tested.
- [ ] Buddy chosen, briefed and given time in their week.
- [ ] Week 1 calendar sent, including first day arrival details.
- [ ] This playbook filled in with dates and the role definition.

DAYS 1 TO 30

- [ ] 30 day goals written and shared on Day 1.
- [ ] Joined at least one buddy review to calibrate.
- [ ] Question log reviewed every Friday.
- [ ] Day 30 checkpoint held and recorded.

DAYS 31 TO 90

- [ ] Partner team introductions made.
- [ ] SOP gaps assigned to owners.
- [ ] Day 60 and Day 90 checkpoints held and recorded.
- [ ] Plan improvements captured for the next hire.

BUDDY OWNS THE DAY TO DAY

BEFORE DAY 1

- [ ] Reviewed the five SOPs the new hire will read first.
- [ ] Blocked time for daily check ins in weeks 1 and 2.

DAYS 1 TO 30

- [ ] Demonstrated the core workflow at least twice.
- [ ] Used watch, do, review on every new task.
- [ ] Reviewed live work daily in week 3.
- [ ] Flagged concerns to the manager early, not at Day 30.

DAYS 31 TO 90

- [ ] Walked through the three most common exceptions.
- [ ] Moved review to every other day, then weekly.
- [ ] Stepped back to on request support by week 9.
- [ ] Observed the teach back and gave feedback.
- [ ] Shared notes with the manager for the Day 90 review.

WORKSHEET

CHECKPOINT CONVERSATION NOTES

Keep each checkpoint to 30 minutes. The new hire speaks first, the manager second. Write down one decision at the end of each.

DAY 30 CHECKPOINT

DATE _____

WHAT IS GOING WELL _____

SUPPORT NEEDED _____

WHAT IS GETTING IN THE WAY _____

TARGET FOR NEXT PHASE _____

DECISION _____

DAY 60 CHECKPOINT

DATE _____

WHAT IS GOING WELL _____

SUPPORT NEEDED _____

WHAT IS GETTING IN THE WAY _____

TARGET FOR NEXT PHASE _____

DECISION _____

DAY 90 CHECKPOINT

DATE _____

WHAT IS GOING WELL _____

SUPPORT NEEDED _____

WHAT IS GETTING IN THE WAY _____

TARGET FOR NEXT PHASE _____

DECISION _____

NEXT STEPS

WHAT TO DO WITH YOUR *results*

If your team found it hard to fill in the Day 1 to 30 page, that is the finding. Most onboarding problems are really missing SOPs and missing definitions of what productive looks like.

01 **Run this plan with your next hire**

Fill in the setup page before Day 1. Do not wait for a perfect version. The first run will show you what to change.

02 **Track two numbers**

Days to first independent task, and days to full target. Write them down for every hire from now on. That is your onboarding baseline.

03 **Fix what the gap logs show**

Every SOP gap a new hire finds is a gap your next hire will also hit. Assign each one an owner.

04 **Protect your buddies**

If the same senior people buddy every hire, they lose selling or delivery time. Rotate the role and count the hours.

FREE CALL

BOOK A DISCOVERY SESSION

BRING YOUR RESULTS TO A DISCOVERY SESSION.

We will walk through your scores together, name the two or three fixes that matter most, and tell you plainly whether you need outside help or can run the fix in house.

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