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What should be included in a 30-60-90-day plan

Each 30-day phase of a plan should include a focus, priorities, goals and metrics for measurement. The focus is different for each phase.

- **Month 1: Learning.** This is where your employee learns about the culture and expectations of your company, as well as the role they're undertaking. It can include reading documentation, such as your mission, procedures and policies. In most roles, this phase should also include meeting the people essential to the job. Depending on the role, this can include colleagues, direct reports, clients and project stakeholders.

- **Month 2: Contributing**. In the second month, your employee should be contributing to the company's mission. This can look different depending on the role but often includes evaluating processes to see if there's room for improvement, contributing to meetings and helping to better the team's functioning. During this phase, they should also be increasing their workload and showing more initiative.

- **Month 3: Execution.** The final 30 days of the plan should focus on using the knowledge and experience gained in the first 60 days to execute ideas and effectively perform their role. For those in managerial or executive roles, the focus should be on leading their team and initiating change that improves processes and advances the company's goals. For employees not hired into leadership positions, this can focus on them taking ownership of their role and working independently instead of relying on a manager to direct their work.

Within the focus or context of each month, the plan should show the employee's priorities. These are more specific than the focus but broader than goals. Priorities can include learning internal processes, forming relationships with all project stakeholders or defining the problems your company needs to solve.

The next section sets goals, which are more specific again. Use SMART goals to help ensure your employee succeeds. SMART goals should be specific, measurable, achievable, relevant and time-bound.

You can use different types of goals to make sure your employees achieve everything you want them to in their role. Many people who use 30-60-90-day plans divide goals into learning goals, professional or performance goals and personal goals. Learning

goals are based on what they need to learn each month, performance goals focus on what they need to achieve and personal goals concentrate on building relationships in the business.

Lastly, each phase needs metrics. This is often covered by the measurable aspect of a SMART goal, but make sure you detail what success looks like for each phase. Make it quantifiable, such as having a five-minute catch-up with each direct report, so it's easy to see that the goal has been achieved.

Tips for working with new employees to make a 30-60-90-day plan

- **Base it on their role.** A 30-60-90-day plan can't be generic. To ensure it's useful for your new employee, use their job description to help guide the creation.

- **Allow for course correction.** Although you should create the entire plan when they start the job, it should be flexible. They may run into challenges, or grasp the role much quicker than expected.

- **Don't write it for them.** Let your employee create their own plan. Not only does this give them ownership, but they know their own strengths and weaknesses and understand where they need to put their focus.

- **Give them the resources they need.** Make sure they have access to the documents and people they need. You can also offer to introduce them to stakeholders or clients and join meetings if you think it's required.

- **Conduct regular reviews.** Meet with them at the 30, 60 and 90 day marks to ensure they're on track. You should also let them know that your door is open if they need help in the meantime.

30-60-90-day plan template

Name:

Position:

Company:

30 Days (Date-Date)

FOCUS: Learning

Priorities: *Summarize your priorities*

Goal	Goal Focus	Metric
Goal 1	*Learning, performance or personal*	*How this will be measured*
Goal 2	*Learning, performance or personal*	*How this will be measured*
Goal 3	*Learning, performance or personal*	*How this will be measured*

60 Days (Date-Date)
FOCUS: Contributing

Priorities: *Summarize your priorities*

Goal	Goal Focus	Metric
Goal 1	*Learning, performance or personal*	*How this will be measured*
Goal 2	*Learning, performance or personal*	*How this will be measured*
Goal 3	*Learning, performance or personal*	*How this will be measured*

90 Days (Date-Date)
FOCUS: Execution

Priorities: *Summarize your priorities*

Goal	Goal Focus	Metric
Goal 1	*Learning, performance or personal*	*How this will be measured*
Goal 2	*Learning, performance or personal*	*How this will be measured*
Goal 3	*Learning, performance or personal*	*How this will be measured*

30-60-90-day plan example

Name: Maria Peters

Position: Technical Writer

Company: Clark Accounting

30 Days (07/01/2021-07/31/2021)

FOCUS: Learning

Priorities:

- Meet all stakeholders for new software implementation
- Learn existing procedures and what documentation will be required in the new manual
- Become familiar with existing templates and documentation

Goal	Goal Focus	Metric
Read documentation for current procedures	Learning	Finish reading the existing handbook and any informal documentation that exists
Learn about needs of all stakeholders	Personal	Hold meetings with future users and determine answers to: - What's your current role? - How do you use the existing software? - What do you need out of the new software? - Who else should I speak with to get a handle on what's required?
Determine the procedures required for the new software	Performance	Complete list and get approved/checked by accounting team manager

60 Days (08/01/2021-08/31/2021)

FOCUS: Contributing

Priorities:

- Develop templates
- Learn new system
- Build relationships with developers

Goal	Goal Focus	Metric
Create a template to use for all procedures that will appear in the how-to manual	Performance	A completed template is produced and sent to change management team, future users and managers for approval
Use the test version of the new software to complete actions required by future users	Learning	Complete at least five procedures on the new system and take screenshots of each step
Build helpful relationships with software development team	Personal	Conduct at least five catch-up meetings with software developers and determine answers to: ● What are the benefits of the new system? ● What are the challenges users will face when transitioning to the new system? ● Are there procedures or processes that won't be required in the new system due to improvements in technology?

90 Days (09/01/2021-09/30/2021)

FOCUS: Execution

Priorities:

- Develop workflows

- Determine help manual requirements
- Increase positive opinion of new software

Goal	Goal Focus	Metric
Document customer life cycle	Learning	Produce workflow that documents customer life cycle and identifies where new procedures will be required
Develop help manual index	Performance	Produce an index listing all procedures to be included in the help manual based on customer life cycle workflow and send for approval from management
Help future users understand the benefits of new software	Personal	Conduct one-on-one sessions with at least two future users to show them the software, answer their questions and demonstrate benefits

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