

# 30/60/90 Day Retention Checklist

## A Practical Guide for Onboarding and Measuring ROI

The first 90 days set the tone for a new hire's success. A strong onboarding plan not only accelerates performance but also protects your investment by improving retention. Use this checklist to track progress at each milestone and measure both the financial and cultural ROI of your new hire.

### 30 Days | Foundation and Clarity

- ✓ Provide role clarity with a written job scope, goals, and success metrics
- ✓ Schedule 1:1 introductions with managers, peers, and cross-functional partners
- ✓ Walk through company values and culture so expectations are clear
- ✓ Review tools, systems, and processes (CRM, ERP, communication platforms, etc.)
- ✓ Align on early wins that can be achieved quickly
- ✓ Confirm access to resources, training materials, and support channels

### 60 Days | Integration and Alignment

- ✓ Review performance progress against initial goals or KPIs
- ✓ Gather peer and manager feedback on collaboration and fit
- ✓ Provide exposure to strategic initiatives or cross-functional projects
- ✓ Align on role-specific challenges and areas of opportunity
- ✓ Revisit training needs and address any skill gaps
- ✓ Encourage networking with broader teams to strengthen connection
- ✓ Measure initial impact on productivity, efficiency, or cost savings



## 90 Days | Impact and Retention

- ✓ *Evaluate progress toward key business outcomes*
- ✓ *Document contributions that have influenced team morale or retention*
- ✓ *Discuss long-term goals, career path, and growth opportunities*
- ✓ *Recognize and celebrate achievements and quick wins*
- ✓ *Solidify understanding of company strategy and their role in driving it*
- ✓ *Measure financial ROI (revenue growth, cost savings, efficiency)*
- ✓ *Track cultural ROI (engagement, collaboration, influence)*
- ✓ *Schedule formal 90-day review and establish next steps*

## 5 Metrics to Track ROI

- 1 **Productivity gains or efficiency improvements**
- 2 **Cost savings or revenue impact**
- 3 **Influence on peer retention or morale**
- 4 **Contribution to strategic goals**
- 5 **Engagement and cultural alignment**



**Need help finding hires worth investing in?**

We help logistics and supply chain companies recruit (and retain) the right talent.