

90-Day Employee Onboarding Plan

A step-by-step plan for contractors hiring their first (or next) employee.

Ritter & Company • ritterandcomp.com

How to use this plan

Print this and check off each task as you go. The first 90 days set the tone for how long a new hire stays and how well they perform. Miss the setup steps and you'll be re-training (or re-hiring) in six months.

Phase	Focus	Outcome
Days 1-7	Paperwork, tools, shadowing	Employee is legally set up and knows the basics
Days 8-30	Hands-on training, systems, safety	Working alongside crew, learning your process
Days 31-60	Independent work with checkpoints	Completing tasks without step-by-step guidance
Days 61-90	Full productivity + 90-day review	Contributing at expected level, formal review

Before Day 1 (Setup Week)

Don't skip these. Showing up unprepared tells your new hire you don't have your act together.

Legal & Payroll

- ☐ Confirm EIN is active and workers' comp policy covers new employee
- ☐ Set up new hire in payroll (Patriot, Gusto, or QuickBooks Payroll)
- ☐ Prepare W-4, I-9, direct deposit form, and state tax forms
- ☐ Prepare signed offer letter with start date, pay rate, and schedule
- ☐ Add employee to health insurance / benefits enrollment (if offered)

Tools & Access

- ☐ Order or assign uniform, PPE (boots, safety glasses, gloves, hard hat)
- ☐ Order business cards or name tag if customer-facing
- ☐ Assign company phone or add to business phone system (QUO, etc.)
- ☐ Create email address and add to job management software (Housecall Pro, Jobber, etc.)
- ☐ Assign truck, tools, and key/code access — document what they receive
- ☐ Prepare Day 1 welcome packet: employee handbook, safety manual, first-week schedule

Week 1: Days 1-7

Day 1

- ☐ Personal welcome (owner or manager) — 15 min sit-down
- ☐ Complete I-9, W-4, direct deposit, emergency contact forms
- ☐ Review employee handbook: hours, PTO, call-out policy, dress code, drug policy
- ☐ Safety orientation: PPE, ladder safety, vehicle policy, incident reporting
- ☐ Tour of shop/office/yard — show where everything is
- ☐ Hand off keys, tools, phone, uniform — sign the equipment receipt
- ☐ Introduce to every crew member by name and role
- ☐ Lunch on the company (build the relationship early)

Days 2-7

- ☐ Shadow lead tech or foreman on every job — no solo work yet
- ☐ Review job management software: how to clock in/out, upload photos, mark job complete
- ☐ Review the customer experience standard (arrival, walk-through, cleanup, sign-off)
- ☐ Watch a full estimate and a full invoice being written
- ☐ End-of-week check-in: what's clear, what's confusing, any missing tools/info

Weeks 2-4: Days 8-30

Hands-On Training

- ☐ Perform tasks under direct supervision, then with light supervision
- ☐ Complete safety training on any specialty equipment they'll use
- ☐ Ride along on at least 3 different job types (service call, install, warranty, etc.)
- ☐ Practice writing up a job in the software solo — reviewed by manager
- ☐ Learn how to handle a customer complaint (script or role-play)

Systems & Standards

- ☐ Confirm they can log time, photos, materials, and notes correctly every day
- ☐ Review the top 5 most common jobs and your standard process for each
- ☐ Introduce upsell / add-on scripts if they'll be selling
- ☐ Give feedback in real time — don't save it for the 90-day review

30-Day Check-In

- ☐ Sit-down conversation: What's going well? What's frustrating? What do you need?
- ☐ Owner/manager gives specific feedback: 2 things going well, 1 thing to improve
- ☐ Confirm pay, hours, and expectations are still clear
- ☐ Document the conversation in their employee file

Days 31-60: Building Independence

- ☐ Assign solo jobs or lead role on small jobs (with backup phone support)
- ☐ Track job performance: time on job, callbacks, customer reviews mentioning them
- ☐ Add a stretch skill: reading blueprints, running a small crew, quoting a change order, etc.
- ☐ Have them train someone else on one task — teaching reveals gaps
- ☐ Confirm they've hit all safety and compliance training deadlines
- ☐ 60-day check-in: performance, morale, career goals, any red flags

Days 61-90: Full Productivity + Review

- ☐ Employee is handling their full workload without daily hand-holding
- ☐ Callbacks, customer complaints, and re-work are at or below team average
- ☐ Review time cards, job notes, and photo quality — coach any gaps
- ☐ Confirm they understand the path to a raise or promotion

90-Day Formal Review

- ☐ Written review: attendance, quality, safety, customer feedback, teamwork, initiative
- ☐ Employee self-evaluation (what they're proud of, what they want to improve)
- ☐ Decision: keep, keep with a plan, or part ways — don't drag out a bad fit
- ☐ If keeping: confirm pay, benefits eligibility, and next 6-month goals
- ☐ Sign and file the review — this becomes the baseline for future reviews

Red Flags to Watch For

- ☐ Chronic lateness or unexplained call-outs in the first 30 days
- ☐ Refusing feedback or blaming crew/customer for mistakes
- ☐ Sloppy paperwork — missing photos, wrong time entries, no job notes
- ☐ Customer complaints about attitude or professionalism
- ☐ Safety shortcuts (skipping PPE, unsafe ladder use, distracted driving)

One red flag = a coaching conversation. Two or more in the first 60 days = a documented performance conversation and a decision by day 90.

Want the full hiring system — offer letters, employee handbook, safety policies, disciplinary forms, and 40+ contractor operations templates? Grab the Operations Manual Bundle at ritterandcomp.com/templates.