30 60 90 day plan template for a new role, with a filled team lead example

A 30 60 90 day plan template helps someone new to a role write their own plan for the first three months: what to learn, who to meet and what to deliver in each 30-day phase, how they and their manager will see progress, and when they will check it together. This kit gives you a blank plan in three phases, a check conversation sheet for day 30, 60 and 90, a filled example from a fictional new team lead and a 60-minute drafting session. It is a working plan, not a probation document.

60 minutes | 1–16 participants | Online and adaptable in person

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The outcome

In 60 minutes each new person has a draft plan of 9 to 12 goals across three phases, each with evidence that they and their manager can both see and a due date inside its phase, plus three check dates worked out from the start date and booked in the calendar.

Before the session

- For trainers who run a new-manager or induction programme for 1–16 people in or near their first two weeks in a role, and for anyone new who drafts their own plan.
- Ask each person to bring their start date and one sentence from their manager on what should be true by day 90. Print the five blank sheets per person, or share the editable file.
- Say in the invitation that the plan belongs to the new person. It is not a probation review or an HR record, and nothing written in the session is collected.
- Send the sheets as plain text for screen readers a day early. People may type, write or dictate, review in writing and pass. Status words, not colours, show progress.

Included in this kit

A facilitator run of show, participant worksheets with real tables, reference tables, debrief questions, adaptation notes and a follow-up plan. Use the editable Word copy to tailor examples and prompts before delivery.

Original material by Superglue. Timings are suggestions; adjust them to your participants. This resource has not been independently evaluated.

What is inside

- Starting point
- Phase 1: learn (day 1 to day 30)
- Phase 2: contribute (day 31 to day 60)
- Phase 3: take ownership (day 61 to day 90)
- Check conversation
- Filled example: starting point
- Filled example: day-30 check
- Filled example: 30-60-90 day plan
- Facilitator section: run of show, reference tables, debrief and adaptations

Starting point

Write this before the goals. Short answers are enough. The plan belongs to you; you choose what to share and when.

Name: _____ Role: _____ Manager: _____

My role in one sentence

_____

_____

_____

What my manager expects by day 90 (ask; do not guess)

_____

_____

_____

What I do not know yet

_____

_____

_____

People I need to meet in the first 30 days (roles)

_____

_____

_____

Known limits: leave, holidays, busy weeks, decisions already made

_____

_____

_____

Start date and my three check dates (first working day on or after day 30, 60 and 90)

_____

_____

_____

Phase 1: learn (day 1 to day 30)

Three or four goals about how the work really runs. Include at least one goal for learning, one for relationships and one small piece of delivery. Each goal starts with a verb and is due on or before the day-30 check.

Day 1: _____ **Day-30 check with my manager:** _____

#	Strand	Goal (starts with a verb)	Evidence: how my manager and I will see it	Due	Status
G1					
G2					
G3					
G4					

Phase 2: contribute (day 31 to day 60)

Three or four goals where you help with what you have learned. Include one small improvement that you choose with the people who do the work. Write in pencil: the day-30 check may change this phase.

Phase starts: _____ **Day-60 check with my manager:** _____

#	Strand	Goal (starts with a verb)	Evidence: how my manager and I will see it	Due	Status
G5					
G6					
G7					
G8					

Phase 3: take ownership (day 61 to day 90)

Two to four goals about what you now own, and one about what comes after day 90. Plan fewer goals if this phase holds leave or holidays.

Phase starts: _____ **Day-90 check with my manager:** _____

#	Strand	Goal (starts with a verb)	Evidence: how my manager and I will see it	Due	Status
G9					
G10					
G11					
G12					

Check conversation

Use one column at each check. Bring the plan and the evidence. The conversation decides what to keep, change or drop; it does not rate you.

What to record	Day 30	Day 60	Day 90
Date, length and who is there			
Goals of this phase: done ___ of ___			
Done, with the evidence I bring			
Behind or dropped, and why			
What I learned that changes the next phase			
What I need from my manager			
Changes we agreed to the plan			
Next check date, booked			

Filled example: starting point

A fictional example. A team lead hired from another organisation to lead an accounts payable team of six writes the starting point on Thursday 22 October 2026, day 4, and shares the plan with the finance manager on Friday 23 October.

Prompt	What the new team lead wrote
My role in one sentence	Lead the accounts payable team of six so that supplier invoices are paid correctly and on time.
What my manager expects by day 90 (ask; do not guess)	Asked on day 2. Know the team and the process; run a month-end close as the lead; bring three priorities for the next six months.
What I do not know yet	Why invoices wait. How approvals work in the finance system. What the team thinks works well and should stay.
People I need to meet in the first 30 days (roles)	The six team members. The financial controller, the purchasing lead, two budget holders and the treasury analyst.
Known limits: leave, holidays, busy weeks, decisions already made	The October close falls in my third week. Phase 3 includes the year-end holidays, and I am on leave from 28 to 31 December, so phase 3 holds three goals, not four.
Start date and my three check dates (first working day on or after day 30, 60 and 90)	Start Mon 19 Oct 2026. Checks: Tue 17 Nov 2026, Thu 17 Dec 2026 and Mon 18 Jan 2027 (day 90 is a Saturday).

Filled example: day-30 check

The check conversation on Tuesday 17 November 2026. Three of four phase-1 goals are done, one is behind with a new date, and one phase-2 goal is dropped.

What to record	Day 30
Date, length and who is there	Tue 17 Nov 2026, 45 minutes, with the finance manager.
Goals of this phase: done ___ of ___	3 of 4 phase-1 goals done.
Done, with the evidence I bring	G1: six one-to-one notes, shown as a summary of themes without names. G2: the invoice flow, checked by two team members. G3: the October close finished on Wed 4 Nov.
Behind or dropped, and why	G4: 4 of 5 colleagues met. One budget holder is on leave until Mon 23 Nov; new date Fri 27 Nov.
What I learned that changes the next phase	Most waiting time comes from invoices without an order number. The team asked for fewer interruptions before 11:00. G7 now tests a check for the order number at arrival.
What I need from my manager	A decision on who approves invoices above the limit while the controller is away. A 15-minute call each Monday until day 60.
Changes we agreed to the plan	Drop G6: purchasing moves to a new system in February; look at it again then. Keep the other phase-2 goals and their dates.
Next check date, booked	Thu 17 Dec 2026, 45 minutes, booked by me on 17 Nov.

Filled example: 30-60-90 day plan

The same fictional team lead: eleven goals, with their status at the day-30 check on Tuesday 17 November 2026.

#	Phase	Strand	Goal (starts with a verb)	Evidence: how we will both see it	Due	Status on 17 Nov	Note
G1	1 Learn	Relationships	Hold a 30-minute first one-to-one with each of my six team members	Six notes on what each person would keep and change	Fri 30 Oct 2026	Done	
G2	1 Learn	Learning	Follow invoices from arrival to payment and draw where they wait	A one-page flow, checked by two team members	Fri 6 Nov 2026	Done	
G3	1 Learn	Delivery	Run the October close beside the senior clerk, without changes	Close done by the third working day; my open questions	Wed 4 Nov 2026	Done	
G4	1 Learn	Relationships	Meet the five colleagues outside the team who depend on us most	Five notes, one line each on what they need	Fri 13 Nov 2026	Behind	4 of 5 met. New date Fri 27 Nov
G5	2 Contribute	Learning	Learn the finance system’s approval rules well enough to answer the team	I answer approval questions and log the ones I still pass on	Fri 11 Dec 2026	On track	
G6	2 Contribute	Relationships	Agree one change with purchasing to how orders reach us	A written agreement with a start date	Fri 4 Dec 2026	Dropped	New purchasing system in February
G7	2 Contribute	Delivery	Test for three weeks one improvement that the team chose	Invoices on hold for no order number, counted weekly	Wed 16 Dec 2026	Not started	Order number check at arrival
G8	2 Contribute	Delivery	Take over the weekly team meeting from the finance manager	Four meetings run by me, with a kept action list	Tue 15 Dec 2026	On track	First meeting Tue 24 Nov
G9	3 Take ownership	Relationships	Agree a development goal for early 2027 with each team member	Six goals that the team members wrote themselves	Fri 15 Jan 2027	Not started	
G10	3 Take ownership	Learning	Learn the 2027 budget process and draft the team’s staffing request	A draft the finance manager can comment on	Fri 8 Jan 2027	Not started	
G11	3 Take ownership	Delivery	Propose three priorities for the next six months, each with a reason	The proposal discussed and agreed at the day-90 check	Mon 18 Jan 2027	Not started	

Facilitator run of show

1 Set the frame and work out the check dates | 5 minutes

Say: “You will leave with a draft of your own plan for your first 90 days. Your manager will see it when you choose to share it. It is a working plan, not a probation document.” Show the check date table. Each person writes their start date and works out three check dates: start date plus 29, 59 and 89 days, moved to the next working day when the date falls on a weekend. Two minutes to frame, two minutes for the dates and one minute for questions.

2 Write the starting point | 10 minutes

Give eight minutes of silent writing on the starting point sheet: the role in one sentence, what the manager expects by day 90, what you do not know yet, the people to meet and the known limits. Say: “If you do not know what your manager expects, write ‘Ask’ and make that your first goal.” Use the last two minutes to read two lines from the filled example aloud, so people see how short each answer can be.

3 Draft phase 1: learn | 12 minutes

Say: “Phase 1 is for learning how the work really runs. Write three or four goals: at least one for learning, one for relationships and one small piece of delivery. Start each goal with a verb.” Give eight minutes of silent writing. Then give four minutes for the evidence column: “How will you and your manager both see that this goal is done? Name something you could show: a note, a list, a finished task.” A goal with no evidence gets rewritten or dropped.

4 Draft phases 2 and 3 more lightly | 12 minutes

Say: “Phases 2 and 3 will change after your first check, so write them in pencil.” Give six minutes for phase 2, contribute: three or four goals, one of them a small improvement chosen with the people who do the work. Give six minutes for phase 3, take ownership: two or three goals, including one about what comes after day 90. Remind people of the known limits on their starting point sheet: fewer goals in a phase with leave or holidays.

5 Add due dates and check the load | 8 minutes

Each person gives every goal a due date inside its phase, on or before that phase’s check date. Then they count: 9 to 12 goals in total, at most four in one phase, and each strand at least once in phase 1. Say: “If the plan feels full on paper, it is too full in real life. Cross one goal out now.” Nobody reads their plan aloud.

6 Pair review | 10 minutes

Form pairs; with an odd number, make one trio with two and a half minutes per person. Partners swap plans and ask three questions: “Which goal could your manager not check from this evidence?” “Which phase-1 goal depends on someone else’s time, and have you asked them?” “Which goal would you drop first?” Four minutes per person, then two minutes to change one line. A person who works alone uses the same three questions in writing, or asks them of their manager when they share the draft.

7 Book the checks and close | 3 minutes

Each person books the day-30 check in their manager’s calendar now, or writes the message that asks for it, and plans to share the draft within five working days. Ask each person for one goal they will start this week, aloud, in the chat or not at all. Close with: “Bring this plan and its evidence to each check. Change it when you learn something; that is what the checks are for.”

Reference tables

Check dates from the start date

Day 1 is the start date. When a day falls on a weekend, the check moves to the next working day. Public holidays are not skipped: move those checks by hand.

Point	Calendar day	Example: start Monday 19 October 2026	Check date (first working day on or after)
Day 1	The start date	Mon 19 Oct 2026	No check
Day 30	Start date + 29 days	Tue 17 Nov 2026	Tue 17 Nov 2026
Day 60	Start date + 59 days	Thu 17 Dec 2026	Thu 17 Dec 2026
Day 90	Start date + 89 days	Sat 16 Jan 2027	Mon 18 Jan 2027

What each phase is for

Phase names and wording are written for this kit. A phase is a focus, not a rule: some learning goes on all 90 days.

Phase	Days	The question for the phase	Typical goals	Leave for later
1 Learn	1 to 30	What is here, who is here, and how does the work really run?	Meet each team member and the key colleagues. See the work done from start to finish. Do the routine tasks once with help.	Changing a process or announcing plans.
2 Contribute	31 to 60	Where can I help, using what I have learned?	One small improvement chosen with the people who do the work. Take over one routine responsibility. Answer common questions without passing them on.	Large changes that need a budget, a restructure or approval from above.
3 Take ownership	61 to 90	What do I now own, and what comes next?	Run a core responsibility as the lead. For a team lead: agree development goals with the team. Propose priorities for the next three to six months.	A judgement of the whole role. That belongs to the normal one-to-ones and review cycle.

Questions for each check conversation

The new person books each check and leads it. 30 to 45 minutes is enough. The manager asks; the plan stays the new person’s.

Check	The new person brings	The manager asks	Decide together
Day 30	Phase-1 goals with evidence. A short list of what surprised me.	“What has surprised you, and what matched what you were told?” “Who have you not met yet who matters to the work?” “Which phase-2 goal would you drop first if time runs short?”	Keep, change or drop each phase-2 goal. The support for the next 30 days.

Check	The new person brings	The manager asks	Decide together
Day 60	What I changed and how I know whether it helped.	“What did the team notice about the change?” “Where do you still wait for someone else to decide?” “What would you do differently if you started this phase again?”	The phase-3 goals. Which decisions the new person now takes alone.
Day 90	A status for every goal, and three priorities for the next three to six months.	“What do you now own fully?” “What do you see in the team that a newcomer would miss?” “What should the next plan cover, if there is one?”	The priorities. How the regular one-to-one takes over from the plan checks.

Filled example: progress at the day-30 check

Counted from the filled example on Tuesday 17 November 2026. Share done = done ÷ (goals − dropped), so phase 1 is 3 ÷ 4 = 75% and all phases 3 ÷ 10 = 30%. Overdue means due before 17 November and not done or dropped: G4 only. The Excel plan makes the same counts.

Phase	Goals	Done	On track	Behind	Not started	Dropped	Share done	Overdue on 17 Nov
1 Learn	4	3	0	1	0	0	75%	1
2 Contribute	4	0	2	0	1	1	0%	0
3 Take ownership	3	0	0	0	3	0	0%	0
All phases	11	3	2	1	4	1	30%	1

What this plan is and is not

Use the plan with the onboarding checklist, not instead of it. Keep it apart from probation and pay decisions.

Document	Who writes it	What it is for
This 30-60-90 day plan	The new person, agreed with their manager	Three phases of goals, each with evidence and a due date, and three check conversations.
Employee onboarding checklist	The team lead and the buddy	The welcome: the first week and the 30-day check, learning and relationships only. Use it alongside this plan.
Goal setting worksheet	One person, any time	One goal with a baseline and a finish line. Use it after day 90, or for one large goal inside the plan.
Probation review	The employer, through HR	Whether the employment continues. Not this kit: keep it separate and follow your organisation’s procedure.
Interview 30-60-90 plan	A candidate, before hiring	A short outline of how the candidate would start. This kit is for someone who has started; see the FAQ.

Debrief and next steps

Questions for reflection

- Which goal in your phase 1 depends most on other people's time, and when will you ask them?
- Which piece of evidence would your manager find hardest to check, and how could you make it visible?
- What did you leave out of phase 1 on purpose, and when will it come back?
- What will you bring to the day-30 check that shows something your manager cannot yet see?

Adapt the session

- For one person working alone, allow 45 minutes: 15 for the starting point and dates, 20 for the three phases, 10 to check the load. Then share the draft with the manager and ask the three pair review questions in a 20-minute conversation.
- For a 30-minute version in a programme, send the starting point sheet as pre-work. In the session, draft phase 1 in full (12 minutes), phases 2 and 3 as one line per goal (8 minutes), due dates (5 minutes) and a short pair review (5 minutes).
- Online, share the plan as an editable file and paste each prompt into the chat. Use breakout rooms of two for the pair review, with cameras optional, and offer a written review in a shared document as an equal choice.
- For quiet participants and people working in a second language, keep all drafting silent and let the pair review happen in writing. Nobody reads a plan aloud, and anyone can pass on the closing round.
- For a new person who does not lead a team, keep the three strands and swap the team goals for peer and customer relationships. For an internal move, shorten phase 1 to the parts of the work that are new and say so on the starting point sheet.

After the session

Within five working days, the new person shares the draft with their manager and agrees any changes. Before each check, they update the status of every goal and gather the evidence. After each check, they change the next phase in writing and book the following check. At day 90 the plan ends: the priorities move into the regular one-to-ones, and longer development goals can go onto a goal setting worksheet. If you run a programme, ask participants afterwards which part of the plan they changed most, and use the answers to improve your session; do not collect the plans themselves.

Questions people ask

What should a 30 60 90 day plan template include?

A short starting point (the role, what the manager expects by day 90, what you do not know yet), three phases of goals across learning, relationships and delivery, evidence and a due date for each goal, and three check dates worked out from the start date. This template adds a check conversation sheet for day 30, 60 and 90.

Who writes a 30-60-90 day plan, the new person or the manager?

In this kit the new person writes it, in the first two weeks, and agrees it with their manager. The manager adds expectations and support and asks questions at the checks. A plan written by the person who will carry it out is easier to own and to change honestly.

How is this different from the employee onboarding checklist?

The employee onboarding checklist is for the team lead and the buddy: the actions that make the first week and the first month work for a new colleague. This plan is the new person's own, covers 90 days and ends each phase with a check. The goal setting worksheet is for one goal with a baseline; use it after day 90 or for one large goal inside the plan.

Is this a probation or performance document?

No. It is a working plan that the new person owns and changes at each check. It does not rate anyone and it does not decide whether employment continues. If your organisation has a probation process, keep it separate and follow your HR procedure; do not attach this plan to it unless the new person agrees.

Can I use this template for a job interview?

It is written for someone who has started a role. A candidate can adapt the three phases into a one-page outline for an interview, but the goals will be guesses until you have met the team. Say that in the interview, keep phase 1 about learning and leave out the check sheet and the workbook.

What is included in the free and editable files?

The open PDF has the starting point sheet, the three phase sheets, the check conversation sheet, filled examples of the starting point, the plan and the day-30 check, and the 60-minute drafting session. Subscribers also receive the editable Word file, an Excel workbook that works out the check dates from the start date and counts progress by phase, and a CSV of the example plan.

Use and sharing

Free to use and adapt in your own training sessions, including paid client work. Do not resell or redistribute the unmodified download as a standalone product. Share the resource page instead.