MotionOps

CONTRACTOR SCALER HUB · HIRE, ONBOARD AND GROW CREW LEADERS

New Hire Onboarding Checklist

Lesson 3 of the course. Fill in one copy per new hire, the week before they start. Every row of the plan gets a named trainer, and the day-14 and day-30 conversations go in the calendar before day one.

NEW HIRE

ROLE

START DATE AND TIME

REPORTS TO

BUDDY (FIELD HIRES)

DAY-14 CHECK-IN DATE

DAY-30 REVIEW DATE

WHO RUNS THE TWO CONVERSATIONS

1. Before day one

- [ ] Written offer accepted; start date and time confirmed; where to park and who to ask for
- [ ] Paperwork done or scheduled for the first hour: eligibility and tax forms, state new-hire reporting, anything your insurer or license requires. The list depends on your state; your accountant has it
- [ ] Logins created: scheduling and job software, email if they get one, the group chat if you use one
- [ ] Gear ready: PPE, uniform, tools or tool policy, vehicle or vehicle policy, keys and codes they're allowed
- [ ] The 30-day plan filled in, with every trainer told their dates
- [ ] A buddy named for field hires: a patient, reliable crew member, not necessarily the most skilled one
- [ ] Their first week's schedule set, so the trainer and the new hire are on the same jobs
- [ ] The standards the plan's rows depend on are written down: what's missing is listed below

STANDARDS THE PLAN NEEDS THAT AREN'T ON PAPER YET

2. The 30-day plan: one row per thing to learn or get

- [ ] Every row has a named person in the trainer column. Not "the team"
- [ ] Shadow, then do with review, then do alone. Nobody owns a task on day one
- [ ] The **unresolved gap** column is filled in at each checkpoint: what's still not there, and what you'll do about it

Learning objective	Access or training needed	Responsible trainer	Practice and checkpoint	Unresolved gap
Example Works safely by our rules: PPE, ladders, tools, site housekeeping	Safety walkthrough on day one; your trade's required training where applicable	Crew lead	Day 1 walkthrough; crew lead checks daily in week one	
Example Knows how a job runs here: start time, morning briefing, photos, clean-up, end-of-day report	Reads the job checklist; shadows the crew lead for a full job	Crew lead	Day 5: explains the checklist back without notes	
Example Clocks in and out, reads the day's instructions and uploads photos in the app	20-minute walkthrough; buddy helps for the first week	Office coordinator (app), buddy	Day 3: did it alone three days running	
Example Does our standard finish work: trim, doors, cabinet installs	Watches, then does with the crew lead checking, then alone	Crew lead	Week 2: one task alone, inspected. Week 4: a full day's tasks, inspected	Cabinet installs: level and plumb fine, scribing slow. Pair with Luis on the kitchen next week.
Example Talks to customers the way we do: greeting, what to say about changes ("I'll have the office call you")	Crew lead explains the rule; practices on site	Crew lead	Day 14 check-in	
Example Knows who to call for what	One-page contact list	Office coordinator	Day 1	

Learning objective	Access or training needed	Responsible trainer	Practice and checkpoint	Unresolved gap

Example rows: a carpenter joining a remodeling crew, in a made-up 16-person company.

For an office hire: moving a responsibility over in four weeks

Write the responsibilities the new hire takes over in the column heads. Each week moves one step: shadow, do with review, do with the trainer on call, own it.

Week	Scheduling (or yours)	Customer updates (or yours)	Invoicing (or yours)	Trainer	Checkpoint
Example 1	Shadows the owner building the schedule; reads the scheduling rules; learns the software	Listens in on calls; reads the update points	Watches two invoices go out	Owner (scheduling, updates), bookkeeper (invoicing)	Friday: can explain the rules back; knows where every job lives in the software
Example 2	Builds Thursday's draft schedule; owner reviews and explains every change	Makes the routine update calls from a script; owner listens to the first five	Sends invoices for completed jobs; bookkeeper checks each before it goes	Owner, bookkeeper	Day 14 check-in. Draft schedule needed fewer than five changes?
Example 3	Builds and sends the schedule; owner reviews after it goes out	Owns routine updates; escalates complaints and scope questions	Sends invoices alone; bookkeeper spot-checks weekly	Owner on call	Friday: zero schedule conflicts the crews had to fix themselves?
Example 4	Owns scheduling. Owner sees changes in the weekly meeting	Owns updates	Owns invoicing. Payment reminders added	Weekly check-in only	Day 30 review

Example: a new office coordinator taking scheduling, customer updates and invoicing from the owner. The plan also has rows for the lead script (trainer: owner, checkpoint: ten calls scored), materials ordering (trainer: operations lead) and the weekly team meeting (attends from week one). The conflict in week two is expected: review it, write the rule that was missing, and continue the handover.

3. Day-14 check-in: 20 minutes, sitting down

Question	Their answer
1. Is the work what you expected? What's different?	
2. What's been unclear, or something you had to work out on your own?	
3. What's been the hardest part so far?	
4. Is there anything you need that you don't have: tools, access, information, time with someone?	
5. What's one thing we should do differently?	

ONE THING THEY RAISED THAT WE FIXED BEFORE THE NEXT WEEK

TOLD THEM WE FIXED IT ON

4. Day-30 review: row by row

Learning objective	Alone, with help, or not yet	Specific feedback, good and bad	Unresolved gap and what we'll do

For each gap: more practice, a different trainer, a written standard that didn't exist, or a conversation about fit. "Doing great" isn't feedback; "the schedule's gone out on time three weeks running" is.

THE NEXT 60 DAYS: ROWS THAT MOVE TO "ALONE," AND ANYTHING NEW

- [ ] Gaps at day 30 mostly the same as at day 14? Check the plan and the trainer's time before you decide anything about the hire

What to review after the day-30 review

- [ ] Planned onboarding steps completed on time, and which trainers ran out of time
- [ ] Unresolved gaps at day 30, and whether they repeat from hire to hire
- [ ] The last three new hires: how many are still with you, and what they said at day 14
- [ ] The plan fixed before the next hire