



Best Days Consulting, LLC

Helping Leaders Create More "Best Days"

90-Day Team Integration Framework

Great onboarding is not just about tasks, systems, and policies. It is about helping people understand identity, relationships, expectations, and how work actually happens inside an organization. This framework is designed to help leaders onboard new team members in a way that builds trust, clarity, contribution, and long-term alignment.

New Team Member:

Primary Onboarding Lead:

Purpose: Support a new team member's transition into an organization by creating clarity around culture, relationships, expectations, and ways of working—while honoring their experience, perspective, and autonomy.

Onboarding Overview

Phase 1: Orientation & Connection (Weeks 1–2)

Focus: Context, relationships, and belonging.

- Introductions to organizational mission, values, and identity
- Conversations that clarify how the organization operates
- Intentional relationship-building with key teammates
- Exposure to core systems, workflows, and current priorities

Desired Outcome: The new team member understands the organization's purpose, key relationships, and where to go for support.

Phase 2: Alignment & Early Contribution (Weeks 3–6)

Focus: Expectations, collaboration, and momentum.

- Clarification of roles, responsibilities, and decision-making
- Early ownership or co-ownership of meaningful work
- Continued integration into team communication and collaboration rhythms
- Regular check-ins to surface confusion, friction, or unmet needs early

Desired Outcome: The new team member is contributing meaningfully while continuing to learn organizational norms and expectations.

Phase 3: Integration & Growth (Weeks 7–12)

Focus: Ownership, development, and long-term fit.

- Reflection on what’s working and what support is needed
- Alignment on strengths, development areas, and priorities
- Transition from onboarding to full ownership of role

Desired Outcome: The new team member feels confident, connected, and embedded within the organization and team.

Part I: MANAGER ↔ EMPLOYEE Core Conversations

(3 structured conversations over the first month)

Conversation 1: Mission, Identity & Culture

Purpose: Ground EMPLOYEE in *why COMPANY exists* and *how it operates differently* than other companies

Focus Area	Guiding Prompts / Questions	Notes / Reflections/Questions for EMPLOYEE
Curiosity about EMPLOYEE & their Journey	• Why COMPANY? What drew you to us? • What galvanizes you about your work? What makes you most excited? Where do you like to pour your energy? • How do you see your role integrating (and to what level of integration) with COMPANY?	
COMPANY Mission & Purpose	• Explain how COMPANY thinks about its role in region/community/world. • What does “helping people, places, and spaces thrive” mean in practice? • What do we mean when we say we are local, relational, and long-term oriented?	
Organization Identity & Philosophy	• How COMPANY approaches real estate <i>actively</i>, not passively. • Why we prioritize regional clients and relationships over volume or national chains.	

	• How we balance being values-driven and for-profit. • <i>You've been in ttheir field for a while. Where have you had to work hard to navigate the possible tension between being values driven and for-profit in your own work?</i> • <i>What does "values-driven" mean for you?</i>	
Values & Culture	• What are the non-negotiables of how we work together? • <i>Share about the culture and norms of your brokerage that you just sunsetted. What were some of the cultural elements and norms that you appreciated? Which ones would you like to leave behind?</i> • What behaviors matter more than technical excellence alone? • <i>Where have you seen ttheir play out in your own career?</i> • What would feel "off" culturally at COMPANY, even if someone was producing? <i>*Don't be an asshole. ; Be around and be present to contribute to the team community. Jumping in to help out.</i>	
EMPLOYEE Reflection	• What resonates most with you about ttheir identity? • Where do you see alignment with how you like to work? • Any hesitations or questions?	

Conversation 2: How MANAGER & EMPLOYEE Will Work Together

Purpose: Set clarity, reduce ambiguity, and prevent unspoken tension, especially given experience differences.

Focus Area	Guiding Prompts / Questions	Notes / Reflections
Roles & Scope	• How do our roles intersect and where are they clearly distinct? • What decisions do you own independently? • Where do you expect collaboration or alignment with me?	
Relationship to OWNER	• How does your work intersect with OWNER's projects, time, and priorities? • What boundaries or norms should we name early to avoid confusion later?	
Collaboration Norms	• How do you prefer to communicate? • What does good coordination look like between us? • How do we surface disagreement productively?	
Power & Trust	• What helps you feel trusted and effective in a new organization? • What expectations do you have of me as GM?	

Updated Conversation 2

Question

- What drew you to COMPANY specifically?
- How do you see your role integrating (and to what level of integration) with COMPANY? - Probing how deep he wants to dive into COMPANY? Does he just want to do broker work? Or is ttheir something deeper?
- EMPLOYEE' Guiding Ethical principles for ttheir work - How do your core values and reasons for doing ttheir work overlap, intersect, and/or diverge from COMPANY' vision?
- The "COMPANY Brand" is more about values and service, than just aesthetic - You;ve run your own brokerage and cared about the "brand" with your name on it.
- Calibration of Hopes & Expectations for their project load and work at COMPANY

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Conversation 3: Support, Development & Growth

Purpose: Honor EMPLOYEE’s experience while identifying real support needs.

Focus Area	Guiding Prompts / Questions	Notes / Reflections
Strengths & Experience	- What parts of ttheir work feel most natural to you? - Where do you feel especially confident?	
Support Needs	- What do you need from COMPANY to be successful here? - Where would early clarity or resources help?	
Learning Curve	- What’s different here from past brokerages you’ve worked in? - Where might COMPANY’s way of working feel unfamiliar?	
Growth Vision	- What kind of work do you want more of over time? - What does success look like for you in year one?	

Part II: Key People to Know at COMPANY

Purpose: Accelerate relationship-building and reinforce cultural importance of people.

Person	Role/Why They Matter & What EMPLOYEE Will Gain	Notes

Coaching Guidance for MANAGER (internal):

- Frame each connection intentionally (“EMPLOYEE, Sarah is the person who really understands ____”). **Don’t want their first conversation with Sarah to be him asking for something that he needs.*

- Emphasize *why* the relationship matters—not just *that* it exists.
- Use these meetings to elevate internal expertise and reinforce shared ownership.

Part III: COMPANY Inner Workings & Operating Context

Purpose: Help EMPLOYEE understand *how things actually get done* at COMPANY.

Area	Key Context to Share	Notes
How COMPANY Makes Decisions	Who weighs in, when speed matters, when alignment matters	
Property Management Model	Relationship between brokers & property management	
Construction & Maintenance	How internal teams interact with deals/projects	
Communication Rhythms	Huddles, informal check-ins, expectations	
What's "Unwritten but True"	Norms people learn over time	

Part IV: Documents, Links & Resources

Purpose: Reduce friction and give EMPLOYEE easy access to what matters.

Resource	Description / When to Use	Link / Location
COMPANY Vision / Values Doc	Culture & identity reference	
Strategic Reflection Framework	Context for long-term thinking	
Org Chart / Contact List	Who does what	

Current Projects / Portfolio	Active work overview	
Other Key Docs	Policies, systems, tools	

Optional Additions (If Helpful, Not Required)

- **30 / 60 / 90-day reflection check-in** (What's clear? What's confusing? What's energizing?)
- **Shadowing moments** (sit in on 1–2 meetings to observe COMPANY norms)
- **Values-in-action stories** (MANAGER shares 2–3 examples of COMPANY living its values)

Coach's Intent (Invisible to EMPLOYEE)

Their onboarding plan is designed to:

- Transfer culture **without over-engineering**,
- Prevent silent misalignment early,
- Empower EMPLOYEE *and* reinforce MANAGER's leadership clarity,
- Turn onboarding into a **leadership act**, not an HR task.
- Be mindful of how EMPLOYEE is contributing to their, make sure he's speaking and being an active participant in their own onboarding practice. If I were being onboarded, what would feel good for me?
- Does he have homework, of sorts? "Go set up a meeting with their person or that person."
- We're more than just individual actors, but organizational leads. I feel a lot of responsibility to COMPANY to make sure we've set things up to be successful into the future.