

COMMUNITY ASSOCIATION

The First 90 Days

Onboarding and retention: how to bring a new support hire in, and keep them.

Days 1–30



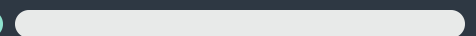
Foundation

Days 31–60



Supervised queue ownership

Days 61–90



Scorecard

START HERE

A new team member is joining your team.

Their job is to take work off your plate. This guide is how you bring them in so they stick.

1

Before day one

Run the remote check. Write two lists. Set up access. Book the one-on-ones.

2

Days 1–90

Hold the weekly one-on-one and three checkpoints.

3

Day 90

Confirm in writing what they now own.

THE TOOLS

TOOL	WHO	WHEN	PAGE
What I Own and What I Don't	Team member	Week one	07
Access and authority worksheet	You	Before day one	08
My 90-Day Plan	Team member	Week one	10
Self-Assessment	Team member	Each checkpoint	12
Manager Review	You	Each checkpoint	13
Checkpoint comparison	Both	Each checkpoint	14
Weekly one-on-one	You	Every week	15
Quick-start checklist	You	Before day one	18

SECTION 1

Why the first 90 days decide everything

Finding the person was never the hard part. You ran the search, sat through the interviews, made the offer. It felt like the finish line. It was the starting line.

In a community association management company, a hire who doesn't stick costs more than a rehire. Homeowners got used to a name, community managers handed over a queue, and the board started expecting answers on a certain clock. When the role empties, that work goes back to the community managers, the same people you hired to protect.

Expect three phases

- 01 The Honeymoon** Everything looks like proof you chose well. Enjoy it. It's a phase.
- 02 The Uncertainty** A reply goes to the wrong person and doubt sets in. The dip is normal. It isn't a bad hire.
- 03 The Refocus** Don't pull back. Fix what's broken in the training, the decision tree or the rhythm. Often it's on your side.

THE WORKED EXAMPLE

This guide follows one role: a **Customer Service Representative** who owns inbound calls and the homeowner inbox.

The inbox is the front door to every community. It's the clearest place to see the rule: who prepares, and who decides.

THE SUPPORT ROLE

Prepares, tracks, documents, routes and escalates.

THE COMMUNITY MANAGER KEEPS

Judgment, approval, fund release and the board relationship.

BEFORE ANY ROLE GOES REMOTE

Remote work isn't automatically permitted for every role in community association management. Before you place anyone, confirm these client by client:

- State licensing requirements for the work involved
- What each management agreement allows
- Any restrictions the board has set
- Insurance coverage
- Who holds final authority for each decision the role touches

If any of these is unclear for an association, that association's work stays put until it's resolved.

SECTION 2

Set it up before day one

It comes down to who decides. A support role prepares, tracks, documents, routes and escalates. Judgment, approval, fund release and the board relationship stay with the community manager.

Write two lists. The second matters more.

✓ OWNS

- Inbound calls and the community inbox, answered inside a stated window
- First-pass triage: resolve, route or escalate against a written decision tree
- Account balance and payment-method questions, from the record
- Portal registration help and password resets
- Logging every contact so the next person has the history
- After-hours voicemail and ticket capture for next-morning routing
- Reporting the top five recurring questions each month

⊘ DOES NOT OWN

- Any judgment call on an enforcement or financial dispute
- Committing the association or the management company to anything
- Negotiating a payment arrangement
- Communication with a board member acting in their board capacity
- Anything a homeowner is likely to forward to an attorney

Write both lists before you write the job posting. Hand both to your community managers before the hire starts, and tell them to read the second list first.

SECTION 2

Week one: six steps

Your team member writes their own 90-day plan. You validate it.

1 Book the one-on-one

30 minutes, same time each week, on both calendars.

2 Send the roadmap prompt

"Write what success looks like in your first 90 days."

3 Set up access

Only what the role needs. No shared credentials. A named approver and escalation path for each kind of contact. Written rules for homeowner, financial, board and vendor data for each association. Use page 08.

4 Walk the two lists

Line by line, until nothing is unclear.

5 Make escalating safe

In this role, a good escalation is the job done right.

6 Confirm next steps

Plan due, access working, lists understood.

BY FRIDAY

Their 90-day plan and their "What I Own and What I Don't," both in their own words.

WEEK ONE

NAME	ROLE	START DATE

[illegible][illegible]

Access and authority

BEFORE DAY ONE

One row per system or permission set. Only the access the role needs. No shared credentials. List any association whose management agreement restricts access under exceptions.

ROLE

COMPLETED BY

DATE

SYSTEM OR PERMISSION SET	ACCESS LEVEL	ASSOCIATIONS COVERED	EXCEPTIONS	APPROVER	ESCALATES TO

Log every access change.

SECTION 3

Month by month

Every role follows the same three months. None hits the scorecard before day 90.

	Days 1–30 Foundation	Days 31–60 Supervised queue ownership	Days 61–90 Scorecard
THEME	Learn the systems and the decision tree	Own the queue, with your review	Hit the scorecard
THEY OWN	Platform, portal, phones. Live on calls with a script within the first few weeks.	The inbox and phones. You review a sample and every escalation.	Everything, with less review, plus the top-five report.
GOOD BY THE END	Every contact logged. Escalations arrive with history.	You no longer take first contact.	Same-day answers. Only real escalations reach you.
YOUR ROLE	Teach. Clear blockers.	Run the 60-day review.	Confirm ownership in writing.
THE TRAP	Unclear lists.	Still rescuing at day 60.	Hovering after they've earned trust.
THE GATE	Self-assessment and an updated plan	Structured review completed	Scorecard review and graduation

THE TEST

If you're still fielding week-one questions at day 90, the onboarding failed, not the hire.

SCORECARD

Answer rate and speed

First-contact resolution

Escalation accuracy

Repeat contacts on the same issue

Contact log completeness

My 90-Day Plan

WEEK ONE

NAME	ROLE	START DATE	REPORTING TO

Days 1–30 Foundation

What I'll own	What success looks like	Questions I need answered

Days 31–60 Supervised queue ownership

What I'll own	What success looks like	What I'll document

Days 61–90 Scorecard

What I'll own	What success looks like	What I'm asking for at day 90

What I own and what I don't, in my own words

WHAT I OWN

WHAT I DON'T

SECTION 4

The checkpoints

Days 30, 60 and 90. Same four steps every time.

1

They score themselves

2

You score separately

3

Compare. The gap is the conversation

4

Reset for the next phase

Score five areas, 1 to 5

Area	1 · Needs work	3 · On track	5 · Owns it
Queue ownership	Waits to be told	Runs it, some questions	Runs it, flags what's coming
Escalation judgment	Decides, or escalates everything	Routes right, with checking	Escalates the right things, every time
Communication	Unclear or inconsistent	Clear and reliable	Calm. Escalations arrive complete
Documentation	Contacts unlogged	Logs consistently	Anyone can pick up any thread
Reliability and follow-through	Misses windows	Meets windows	Closes loops without chasing

Self-Assessment

EACH CHECKPOINT

NAME

REPORTING TO

CHECKPOINT

☐ Day 30 ☐ Day 60 ☐ Day 90

THE MAIN THING I OWN

The five areas

1 Needs work · 3 On track · 5 Owns it

Queue ownership

(1) (2) (3) (4) (5)

Proof _____

Escalation judgment

(1) (2) (3) (4) (5)

Proof _____

Communication

(1) (2) (3) (4) (5)

Proof _____

Documentation

(1) (2) (3) (4) (5)

Proof _____

Reliability and follow-through

(1) (2) (3) (4) (5)

Proof _____

My biggest win

Where I fell short, no excuses

Root cause and my fix

What I need from you

My top three priorities for the next 30 days

The scorecard measures I'll report weekly

My overall read on myself

Manager Review

EACH CHECKPOINT

TEAM MEMBER

CHECKPOINT

☐ Day 30 ☐ Day 60 ☐ Day 90

The five areas

1 Needs work · 3 On track · 5 Owns it

Queue ownership

1 2 3 4 5

Note

Escalation judgment

1 2 3 4 5

Note

Communication

1 2 3 4 5

Note

Documentation

1 2 3 4 5

Note

Reliability and follow-through

1 2 3 4 5

Note

What can I now trust them to own without reminders?

Where are they still waiting for direction, and is that because a rule was never written down?

Has anything crossed the authority boundary that shouldn't have?

If they left tomorrow, what breaks first?

What would make them excellent over the next 30 days?

My decision

What changes now

Checkpoint comparison

EACH CHECKPOINT

Fill it in together, after both scores are in.

TEAM MEMBER

CHECKPOINT

☐ Day 30☐ Day 60☐ Day 90

AREA	THEIRS	MINE	GAP	WHAT WE AGREED
Queue ownership				
Escalation judgment				
Communication				
Documentation				
Reliability and follow-through				

Reset for the next phase

SECTION 5 · RUNNING IT

The weekly one-on-one

30 MINUTES · EVERY WEEK

TEAM MEMBER

WEEK OF

WEEK (1-13)

1 Progress What moved, what didn't

2 Feedback What improved, what's in the way

3 Escalations

- ☐ Right calls ☐ Wrong level ☐ Decision tree needs a branch

4 Next steps One or two priorities

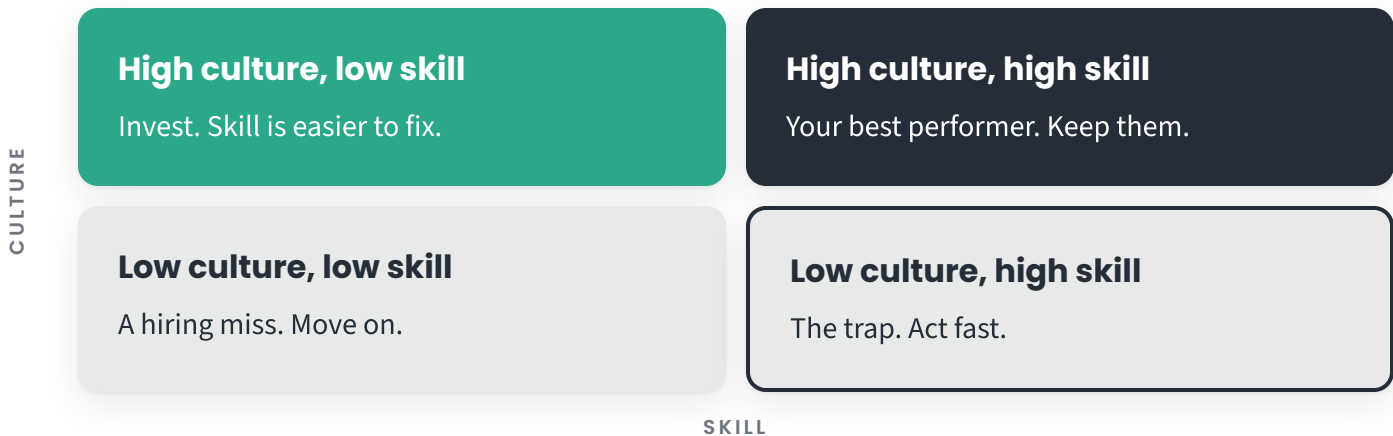
5 Support What they need from you

QUESTIONS TO PULL FROM

- Which contact this week were you least sure how to handle?
- Did anything reach you that should have gone to the community manager, or the other way around?
- How's communication with the community managers?
- Is there a question you're answering over and over that we should write down once?
- Is anything stopping you from meeting the response window?
- What's one thing I can do to support you better this week?

SECTION 5

When doubt hits



Most doubt at day 30 is a gap on your side.

Fix your side first

1	Training	Reteach the weak spots.
2	The two lists	Written down, or in your head?
3	The scorecard	Can they see their numbers?
4	Connection	Is the team working with the new hire, or around them?
5	Feedback	Are you giving it and asking for it?

90 DAY 90 Graduation

Look at the whole picture:

Scorecard

Escalation
judgment

Documentation

Fit

THEN

01 Confirm what they own, in writing.

02 Set expectations for the next six months.

03 Plan the next handoff.

04 Name what they gave back to you.

The hire was the bet.
**The first 90 days are how it
pays off.**

Quick-start checklist

Before day one

- ☐ Remote-readiness confirmed for each association
- ☐ Both lists written
- ☐ Community managers have read the does-not-own list
- ☐ Scorecard defined
- ☐ One-on-ones on both calendars
- ☐ Day 30, 60 and 90 dates booked
- ☐ Access set, approvers named

Week one

- ☐ Roadmap prompt sent
- ☐ 90-day plan returned
- ☐ "What I Own and What I Don't" received
- ☐ Decision tree walked through

Every week

- ☐ One-on-one held
- ☐ Escalations reviewed

The gates

- ☐ Day 30: self-assessment and an updated plan
- ☐ Day 60: structured review completed
- ☐ Day 90: scorecard review and graduation, ownership confirmed in writing

YOUR FIRST STEP

Book the weekly one-on-one today. Then ask: "What should never reach me once you've been here 30 days?"

THE NEXT STEP

Design the role before you hire for it.

Book a 30-minute consultation with BetterWho. Bring the queue costing your team the most. We'll work out which role fits it, what it owns, and what stays with the community manager.



Book your 30-minute consultation →

betterwho.com/services/staffing/community-associations

**BETTER
WHO**

Work on your business, not in it.

betterwho.com