

The Fundraiser Onboarding Plan

A Manager's First 90 Days

30-60-90 Day Onboarding Plan

A roadmap for your first three months



An action plan for ramping up a new fundraiser: what to do, what they should be able to do, and how you will know it is working, week by week.

A field guide from Practivated

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Start here

Most fundraising teams onboard new hires the same way: build the plane while flying it, every single time. The new fundraiser gets a portfolio, a few introductions, and a quiet expectation to figure out the rest by watching whoever sits nearby. Ramp speed ultimately depends on which manager they happened to get.

This is the plan we wish every manager had. It is built around one idea: onboarding is not information you hand someone; it is a set of actions you take together over 90 days. Each phase tells you what to do as the manager, what your new hire should be able to do, the goal for the phase, and a real benchmark so you can tell it is working. Use the numbers as strong starting points and adjust them to your context.

Two kinds of onboarding, and this plan is about the second one. Onboarding to the institution (HR paperwork, systems, mission, who governs the funds) is usually handled centrally, often on a group start day before a new hire even meets your team. This plan assumes that part is covered. It focuses on the part that almost always falls to the manager and almost never gets a plan: onboarding to the *profession* of fundraising itself. The next page is a quick prep checklist for before day one. Everything after it is the 30/60/90 action plan.

How readiness actually gets built

A quick note on why this plan looks the way it does. Knowing what to do and being able to do it under pressure are two different things, built in two different parts of the brain. Information alone does not transfer to the room with a donor. Readiness is the combination of skills, confidence, and muscle memory, and all three are built the same way: through real practice with personalized feedback, repeated over time. That is why every phase pairs learning with reps, and why the benchmarks track what someone can do, not how many videos they watched.

Before day one: the 15-minute prep checklist

Most of day one is owned by HR and your central team. Your job is smaller and more specific: make sure that when this person is ready to actually fundraise, they are not starting from a blank page. Prepare these before they start so week one is not lost to scavenger hunting.

✓	Have it ready before they start
☐	A starting portfolio with context. Fundraiser's first 10–15 prospects, with a one-line note on each. Not an empty list.
☐	The case for support, in plain language. The version a person can say out loud, plus the few stories that prove it.
☐	What “ready” looks like at 30, 60, 90. Share this plan, so the target is clear from the start.
☐	Your outreach cadence and standards. Including how many attempts before moving on. New hires quit too early without this.
☐	A written first-week schedule. So day one is not “read these PDFs and good luck.”
☐	Their first practice session, booked. A low-stakes rep on talking about your cause, before it counts with a donor.
☐	Recurring 1:1s already on the calendar. Weekly to start. Booked before they begin, so they actually happen.

The 90-day action plan

Three phases, each building on the last: learn the craft, apply it with real donors, then do it independently. Work the actions, watch the benchmark, and adjust the pace to the person.

Days 1–30

Foundation: learn the craft, get the first reps

What you do as the manager	What the fundraiser does
• Walk fundraisers through the full donor cycle and your shared definitions of each stage. • Run fundraisers' first practice session together, then make practice a standing weekly habit. • Co-review fundraisers' starting portfolio and pick the first three prospects to focus on. • Give specific, personalized feedback after each rep, not just “nice job.”	• Learn to talk about your cause clearly and confidently in their own words. • Complete their first practice reps on opening and qualifying conversations. • Run a basic qualification conversation and listen for capacity and affinity. • Name the next step for their first three real prospects.
THE GOAL FOR THIS PHASE Fundraisers can explain, unprompted, why a donor would care about your work, and know what a good first conversation looks like.	THE BENCHMARK TO WATCH At least 5 practice reps completed and at least 3 prospects with a defined next step by day 30.

Days 31–60

Application: real donor conversations, with feedback

What you do as the manager	What the fundraiser does
• Shadow one real donor conversation, then have fundraisers debrief it with you. • Use 1:1s to review one real conversation each week, not just pipeline status. • Coach to the outreach cadence. Watch for stopping too early and name it directly. • Have them practice the ask in low-stakes reps before the first real one.	• Hold real discovery meetings and follow the full outreach cadence without giving up early. • Ask qualifying questions that surface motivation, not just wealth. • Bring one real conversation to each 1:1 and name what they would do differently. • Open and deepen donor relationships rather than transact.

THE GOAL FOR THIS PHASE

Fundraisers are running real donor conversations and learning from each one, not avoiding the hard parts.

THE BENCHMARK TO WATCH

Persisting through 5–7 outreach attempts (not stopping at 3), with donor touchpoints rising month over month.

Days 61–90

Independence: own the ask, self-correct

What you do as the manager	What the fundraiser does
• Support fundraisers' first real ask, then debrief the reasoning, not just the outcome. • Shift 1:1s from directing to coaching: ask more than you tell. • Point feedback at the work, not the person: "let's look at what the feedback is showing." • Set the expectation that practice and feedback continue past onboarding.	• Move a donor toward solicitation with a clear, deliberate strategy. • Make a direct, specific ask and handle the response gracefully. • Steward a gift in a way that sets up the next conversation. • Self-correct from feedback instead of waiting to be told.

THE GOAL FOR THIS PHASE

Fundraisers can run the full cycle independently and bring strategy questions to 1:1s, not just logistics.

THE BENCHMARK TO WATCH

At least 1 real ask made and debriefed, and they can walk you through the reasoning behind it.

The numbers that tell you it worked

The phase benchmarks are your week-to-week signals. These are the outcomes they add up to. Teams that onboard this way, pairing learning with real practice and feedback, see the difference show up in the metrics that matter.



When you are ready to stop rebuilding the plane every time you hire

This plan gives you the structure. The hard part is running it consistently for every hire: delivering the practice, giving personalized feedback on every rep, and seeing where each person is actually getting stuck, all without adding a second job to your week.

That is what Practivated's onboarding tool was built to do. It turns this exact plan into a guided experience your fundraiser moves through, with real conversation practice, personalized feedback on every rep, and a view for you into where they are in the 30/60/90, so ramping up a new hire no longer depends on who happened to have time that week.

See what your onboarding could look like: practivated.com