



The Skills Framework Guide for SMBs

A COMPLETE TOOLKIT FOR SETTING EXPECTATIONS, SUPPORTING GROWTH, AND BUILDING ACCOUNTABILITY IN SMALL BUSINESSES

WHY SMALL BUSINESSES NEED A SKILLS FRAMEWORK

Small employers often struggle with onboarding and performance management. Without clear expectations, employees feel uncertain about how they're doing, managers don't have a consistent process to follow, and reviews become reactive rather than proactive.

A SKILLS FRAMEWORK SOLVES THIS BY:

- Setting transparent expectations from day one.
- Giving managers and employees a shared roadmap.
- Supporting accountability and growth through structured conversations.
- Reducing turnover by ensuring employees feel supported and clear on their path.

THIS GUIDE PROVIDES YOU WITH TWO SIMPLE, ADAPTABLE TOOLS:

- **A 30/60/90-DAY CHECK-IN GUIDE:** TO STRUCTURE MEANINGFUL CONVERSATIONS AND FEEDBACK.
- **A SKILLS & PERFORMANCE FRAMEWORK TEMPLATE:** TO DEFINE ROLE-SPECIFIC SKILLS, TRACK PROGRESS, AND MEASURE PERFORMANCE.

Together, these tools give SMBs a repeatable system for developing employees without heavy HR bureaucracy.

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PART 1: 30/60/90-DAY CHECK-IN GUIDE

PURPOSE:

To create regular touchpoints between managers and employees that strengthen relationships, surface issues early, and support engagement.

30-Day Framework: The Discovery Phase

Goal: Ensure the employee is learning core skills and starting to take responsibility.

QUESTIONS TO ASK:

- **IS THIS JOB WHAT YOU EXPECTED?**
- **DO YOU FEEL YOU HAVE THE TOOLS AND RESOURCES YOU NEED?**
- **HAVE YOU FELT WELCOMED BY THE TEAM?**
- **WHAT HAVE YOU LEARNED SO FAR?**
- **WHAT'S GOING WELL?** ✓
- **WHAT GOALS DO YOU HAVE FOR THE NEXT 30 DAYS?**

60-Day Framework: The Ownership Phase

Goal: Understand how onboarding is going and identify any early challenges.

QUESTIONS TO ASK:

- **ARE THERE ANY CHALLENGES WITH COMMUNICATION OR SYSTEMS?**
- **HOW ARE YOU ADAPTING TO CLIENTS/PARTNERS/STAKEHOLDERS?**
- **WHAT DO YOU FEEL COULD HAVE BEEN BETTER COVERED IN ONBOARDING?**
- **WHAT SKILLS OR KNOWLEDGE DO YOU WANT TO BUILD IN THE NEXT 30 DAYS?**
- **WHAT'S GOING WELL?**
- **WHAT GOALS DO YOU HAVE FOR THE NEXT 30 DAYS?**



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90-Day Framework: The Growth Phase

Goal: Assess readiness for independence, measure initial performance, and set long-term goals.

Questions to Ask:

- HOW DO YOU FEEL AFTER 90 DAYS?
- DO YOU FEEL ONBOARDING WAS SUCCESSFUL?
- WHAT'S BEEN SURPRISING ABOUT THE ROLE OR COMPANY?
- HOW WOULD YOU RATE YOUR PERFORMANCE SO FAR?
- DO YOU FEEL YOUR IDEAS ARE VALUED?
- WHAT LONG-TERM GOALS DO YOU HAVE HERE?
- WHAT ARE YOU LOOKING FORWARD TO IN THE NEXT 90 DAYS?
- WHAT FEEDBACK DO YOU HAVE FOR ME AS A LEADER?

Quarterly Check-Ins

After the first 90 days, continue quarterly check-ins focused on reflection and growth.



Prompts:

- What were your top highlights this quarter?
- What did you learn that you want to carry forward?
- What feedback do you have for me or the company?
- What are your goals for next quarter?

Quarterly Check-Ins

After the first 90 days, continue quarterly check-ins focused on reflection and growth.

Prompts:

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Part 2: Skills & Performance Framework Template

Purpose: To define what success looks like in a role over time — starting with skills the employee should bring to the table and ending with the level of ownership and initiative expected after the first year.

How to Use

1. Break down expectations into two categories:
 - **Skills** (job-specific, technical abilities)
 - **Relationships** (soft skills, collaboration, communication)
2. Define expectations by time frame:
 - **Upon Hire**: Skills an employee should already have.
 - **First 30–90 Days**: What they should learn during onboarding.
 - **Second 90 Days (Months 4–6)**: What they should be able to handle independently.
 - **Final 6 Months (Months 7–12)**: What ownership and growth should look like.
3. For each skill, identify how mastery will be demonstrated.

Upon Hire

These are the skills and experiences an employee should already have.

SKILL	CATEGORY (SKILL/RELATIONSHIP)	SYSTEM OR EXPERIENCE	DEMONSTRATED BY
Example: Industry Knowledge	Skill	Experience	Describes prior work in similar roles
Example: Communication	Relationship	Experience	Gives clear updates in interviews and early team interactions



First 30–90 Days

Training and development phase - learning core systems and relationship expectations.

TIME FRAME	SKILL	CATEGORY (SKILL/RELATIONSHIP)	SYSTEM OR EXPERIENCE	DEMONSTRATED BY
30 DAYS	Example: Basic System Navigation	Skill	SYSTEM	Can log in, enter data, and run simple reports
60 DAYS	EXAMPLE: COMPLIANCE BASICS	SKILL	Experience	Answers common policy questions with minimal guidance
90 DAYS	EXAMPLE: CLIENT/TEAM COMMUNICATION	RELATIONSHIP	Experience	Communicates with clients/team without errors

Second 90 Days (Months 4–6)

Employee demonstrates independence and initiative.

SKILL	CATEGORY (SKILL/RELATIONSHIP)	SYSTEM OR EXPERIENCE	DEMONSTRATED BY
Example: Leadership Readiness	Relationship	Experience	Mentors newer team members, shares best practices
Example: Process Improvement	Skill	Experience	Identifies and suggests improvements to workflows



Final 6 Months (Months 7–12)

Focus on ownership, accountability, and growth.

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Bringing It All Together

When used together, the Check-In Guide and Skills Framework create a complete system for small employers to:

- **ONBOARD NEW HIRES CONSISTENTLY.**
- **SUPPORT EMPLOYEES THROUGH STRUCTURED CONVERSATIONS.**
- **DEFINE CLEAR PERFORMANCE EXPECTATIONS.**
- **BUILD ACCOUNTABILITY AND TRUST WITHOUT HEAVY HR OVERHEAD.**

👉 **Pro tip:** Start by piloting this process with one role. Refine your framework as you go, then expand it to the rest of your team.

Sample Skills Framework: Office Assistant

Role: Office Assistant

Upon Hire

Skills and experiences expected on day one.

TIIME FRAME	CATEGORY (SKILL/RELATIONSHIP)	SYSTEM OR EXPERIENCE	DEMONSTRATED BY
BASIC COMPUTER SKILLS	Skill	System	PROFICIENT IN MICROSOFT OFFICE/GOOGLE WORKSPACE (EMAIL, CALENDAR, DOCS, SHEETS)
CUSTOMER SERVICE	RELATIONSHIP	EXPERIENCE	Demonstrates ability to manage multiple simple tasks daily
TIME MANAGEMENT	SKILL	EXPERIENCE	Experience
COMMUNICATION	RELATIONSHIP	EXPERIENCE	Speaks and writes clearly with minimal errors

First 30-90 Days

Training and development phase - learning systems, processes, and relationship expectations.

TIIME FRAME	SKILL	CATEGORY	SYSTEM OR EXPERIENCE	DEMONSTRATED BY
30 DAYS	Office Systems Navigation	Skill	OFFICE SOFTWARE, FILING SYSTEMS	CAN SCHEDULE MEETINGS, MANAGE FILES, AND SEND INTERNAL COMMS
60 DAYS	BASIC HR/PAYROLL SUPPORT	SKILL	Experience	Assists with new hire paperwork, timesheets, or basic data entry
90 DAYS	TEAM/CLIENT COMMUNICATION	RELATIONSHIP	Experience	Communicates updates to staff/clients confidently without supervisor review

Second 90 Days (Months 4–6)

Employee demonstrates independence and initiative.

TIME FRAME	CATEGORY	SYSTEM OR EXPERIENCE	DEMONSTRATED BY
TASK PRIORITIZATION	SKILL	EXPERIENCE	INDEPENDENTLY ORGANIZES AND COMPLETES DAILY WORKLOAD
PROBLEM-SOLVING	SKILL	EXPERIENCE	Resolves common office issues (e.g., scheduling conflicts, supply orders) without escalation
RELATIONSHIP BUILDING	RELATIONSHIP	EXPERIENCE	Builds trust with colleagues and vendors by responding promptly and reliably

Final 6 Months (Months 7–12)

Focus on ownership, accountability, and growth.

TIME FRAME	CATEGORY	SYSTEM OR EXPERIENCE	DEMONSTRATED BY
OPERATIONAL EXCELLENCE	SKILL	EXPERIENCE	CONSISTENTLY ERROR-FREE IN SCHEDULING, REPORTING, AND COMMUNICATION
PROCESS IMPROVEMENT	SKILL	EXPERIENCE	Suggests and implements small efficiency improvements (e.g., tracking system for supplies)
LEADERSHIP READINESS	RELATIONSHIP	EXPERIENCE	Trains or supports new hires in office procedures

Why This Works

This example shows how even a simple, entry-level role like Office Assistant can have clear, staged expectations. Employees know what's required, managers have a roadmap for feedback, and the business gets consistency in onboarding and evaluation.