New hire onboarding checklist

This comprehensive checklist is your guide to welcoming new customer marketing team members effectively. It provides a clear, organized roadmap for their entire onboarding - from pre-start preparations through their first few months.

Here we'll cover all the crucial tasks, training, introductions, and resources needed to integrate new hires smoothly, keeping you on track while fostering connection to your team's culture and workflows.

With this tool, you'll be equipped to provide your newest hire with a seamless, well-structured onboarding experience that sets them up for success from day one!

Before day 1	Email over some suggested reading for before they start - think influential books, blog posts or podcasts etc. that are part of your company's 'canon'	☐
	Prepare essential documents and make sure they're all accessible from one place. Consider things like: • Resources they'll be using • People they need to know • Important internal documents (messaging, positioning, etc.) • Passwords	☐
	Put all stakeholder meetings in their calendar	☐

	Educate key stakeholders on the new hire's role and responsibilities	☐
	Set-up accounts for: ● Email ● Any tools/programmes they'll need to login to	☐
Day 1	Make introductions to all immediate team members	☐
	Send an intro email to wider people/teams who they might not meet on day one, but will cross paths with in their first few days	☐
	Go through the organization's objectives and values	☐
	Discuss the team's current projects, KPIs and focus points	☐
Week 1	Have a focussed session and demo on the ins and outs of the product(s) they'll be marketing - ideally, someone from the Product team should deliver this	☐
	Go through and explain/demo all the tools they'll have access to and need to use	☐
	Set time aside for your hire to read through those resources and documents you prepared for them before they started	☐
	Discuss their OKRs	☐
	Let them know which people/departments they should go to for X, Y and Z - it might be worth documenting this too	☐
	Run through recent launches and results	☐

Weeks 2-6	Outline pipeline launches and their role in each	☐
	Explain the sign-off process for different projects	☐
	Sit them down with key stakeholders so they can understand their aims: • Product • Customer Success • Sales • Engineering • Marketing • Finance • CEO	☐
	Get to know direct and indirect competitors	☐
	Listen in to some sales calls	☐
	Listen in to some customer support calls	☐
	Listen in to any win-loss/feedback/case study calls	☐
	Ask them to present feedback from their call listening	☐
	Run through budgets	☐

	Ask them to review any existing inventory - this will give them a great feel for what you've already got in place while getting them involved in a more hands-on way: • Website • Recent emails/in-app messages • Sales one-pagers • Case studies • Battlecards • Buyer/user personas • Positioning statement • Messaging template • Videos • Webinars • Whitepapers	☐
	Get them to sit in on a few sales and product meetings to help them understand how they operate	☐
	Revisit their OKRs and work on a 30-60-90 day plan together	☐
	By this point they should be set-up and self-sufficiently managing their working week	
Ongoing	Put regular 1-2-1s in the calendar	☐
	Check they have everything they need from you to do their job	☐
	Ask if they're struggling with any internal or external blockers	☐

	Review their OKRs	☐
	Put career development plans in place	☐