New hire onboarding checklist

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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 organisation'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 most of 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	☐