

New hire onboarding checklist

Powered by:  The Alliance

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'	<input type="checkbox"/>
	Prepare essential documents and make sure they're all accessible from one place. Consider things like: <ul style="list-style-type: none">• Resources they'll be using• People they need to know• Important internal documents (messaging, positioning, etc.)• Passwords	<input type="checkbox"/>
	Put all stakeholder meetings in their calendar	<input type="checkbox"/>
	Educate key stakeholders on the new hire's role and responsibilities	<input type="checkbox"/>
	Set-up accounts for: <ul style="list-style-type: none">• Email• Any tools/programmes they'll need to login to	<input type="checkbox"/>
	Day 1	Make introductions to all immediate team members
Week 1	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	<input type="checkbox"/>
	Go through the organisation's objectives and values	<input type="checkbox"/>
	Discuss the team's current projects, KPIs and focus points	<input type="checkbox"/>
	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	<input type="checkbox"/>
	Go through and explain/demo all the tools they'll have access to and need to use	<input type="checkbox"/>
	Set time aside for your hire to read through those resources and documents you prepared for them before they started	<input type="checkbox"/>
Discuss their OKRs	<input type="checkbox"/>	
Let them know which people/departments they should go to for X, Y and Z - it might be worth documenting this too	<input type="checkbox"/>	
Run through recent launches and results	<input type="checkbox"/>	

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

- Put regular 1-2-1s in the calendar
- Check they have everything they need from you to do their job

Ongoing

Ask if they're struggling with any internal or external blockers

Review their OKRs

Put career development plans in place