

Marketer Onboarding CHECKLIST



FIRST 90 DAYS

INTERNAL LEARNING

PRODUCTIVITY EXPECTATIONS

Days 1 - 30

- Learn the business & industry
- Meet coworkers
- Meet suppliers

- Learn internal systems & platforms for marketing
- Develop planning & project tracking processes
- Review existing resources and set up files
- Prioritize projects

Days 31 - 60

- Work with sales team
- Identify current gaps
- Understand customers
- Meet regularly with appropriate team members

- Identify quick-win projects
- Set activity goals for the next quarter
- Begin accountability processes

Days 61 - 90

- Regular connection with internal and external stakeholders and suppliers
- Following processes
- Using systems

- Create a plan to manage the marketing function (to the limits of capacity of the position)

CONFIRM YOUR COMMITTMENT

Leadership (Owners, C-Suite)

- Leadership message
- Company history, mission, vision, core values
- Corporate and team structure

Peer support

- Introductions
- Welcome from individuals
- Assign a mentor
- Early tips
- Training days with key support people
 - Marketing
 - Human resources
 - Manufacturing / production
 - Engineering / product development
 - Order fulfillment / customer service
 - Others _____

CREATE A SHARED DEFINITION OF SUCCESS

- Communicate corporate goals & strategies
 - Long-term
 - Short-term
- Communicate goals, metrics, and performance expectations for the individual
- Show them the tools available to measure performance

SHARE EXISTING RESOURCES

- Industry information (trends, insights, market dynamics, etc)
- Competitive information and approach
- Ideal customer profiles
- Key market identifiers
- Technical product / service guides
- Features, benefits, competitive advantages
- Sales technology, CRM, ordering system, etc
- Product / service positioning
- Sales process and buying cycle
- Qualifying questions
- Frequently asked questions
- Common objections
- Key messages
- Marketing resources
- Regulatory, ethical, legal

TRAINING

Role-specific training

- Product / service technical skills
- Market analysis
- Tools training (sales technology, CRM, ordering system, etc)

Communication skills

- Listening
- Questioning
- Reporting
- Knowledge Sharing