

Agency new hire onboarding checklist

ONBOARDING CHECKLIST TEMPLATE

Employee _____ Role _____ Start date _____

Buddy or manager _____

Onboarding From the signed offer to running client work alone

TASK	DUE	DATE	INITIALS
Before day 1			
☐ Set up their laptop, email and accounts for the project, time, chat and design or ad tools the role uses	Before day 1		
☐ Add them to the client accounts they'll work on, with their own login	Before day 1		
☐ Name a buddy and the manager who will sign them off	Before day 1		
Week 1			
☐ Explain how the agency plans, tracks and reports work, and where everything lives	Week 1		
☐ Show how time is tracked, and the codes for each client and task	Week 1		
☐ Go through the services the agency sells and how each one is delivered	Week 1		
☐ Train them on the creative review and approval procedure	Week 1		
Clients			
☐ Read the playbook for each client they'll work on, including preferences and approvers	Week 2		
☐ Meet each client's account lead, and join a client call as an observer	Week 2		
Shadowing and supervised work			
☐ Shadow a senior on each type of work they'll do	Weeks 2 to 4		
☐ Deliver their first pieces of work with a reviewer checking each one	Weeks 3 to 6		
☐ Sign them off on each type of work they can deliver alone, and record it	Weeks 4 to 8		
Reviews			
☐ Hold check-ins at 30 and 60 days on progress, questions and workload	Days 30 and 60		
☐ Review their work, client feedback and goals at 90 days	Day 90		

Completed by _____ Checked by (manager) _____ Date _____ Notes _____