

How To Onboard Digital Marketing Talent According To Agency Leaders

Effective onboarding of digital marketing talent is key to setting the foundations for a positive employee experience.

It's also vital for accelerating productivity, boosting employee retention, and cultivating a positive company culture.

When done right, it leads to more engaged and profitable staff in the long run.

Solid and thorough inductions also help new employees understand the company culture, responsibilities, and nuanced team dynamics. More importantly, they can also serve to bridge any skill gaps and set the stage for success.

With all of this considered, you'd naturally think that onboarding would be a top priority for all founders. Sadly, this is often not the case.

Poor Onboarding Or Lack Thereof Is Killing Your Retention

Last year I placed 70 candidates in new roles. Seven quit of their own accord before their probation was up. Of these, all of them but one attributed a poor onboarding process to their early departure.

- Three had never met their manager in person, not even once.

- Two cited feeling isolated and removed from the rest of the business, despite working in the office.
- Three had commented about trying but being unable to meet every stakeholder in the business to understand their motivations.
- One reported not having a single proper conversation with their manager about key performance indicators (KPIs).

Historical Resentment Combined With Poor Communications

Nobody intentionally onboards staff poorly.

It often happens when there's a rush to get the new hire started fast, usually because of bad planning and a long recruitment process, which translates to: "We needed you yesterday, so just jump in."

This urgency can create a stressful environment for new staff.

Existing team members who might have taken the slack in their absence may quickly start offloading responsibilities, potentially overwhelming the employee.

Businesses that don't address this early on end up with a high turnover.

So, How Can Agencies Improve Their Onboarding Process?

I spoke to various agency founders and directors across the UK, the U.S., Australia, and Dubai and I asked them for their insights and advice about onboarding.

Here's what they recommend:

Observation And Shadowing Are Vital

Zoe Blogg, the Director of Operations at independent SEO & Content Marketing agency, Reboot, says: “It’s about immersion. Our process is designed to give new hires time to truly absorb how we work before they’re expected to contribute. In the first two weeks, we encourage new team members – especially at a senior level – to focus on listening, observing, and understanding our culture, processes, and workflows before making any major changes or suggestions.”

Supporting the idea that early collaboration and involvement are key, Kristi Hoyle of Kaizen actively encourages new starters to sit in on ideation sessions and client strategy meetings, even with teams they won’t directly work with. The ultimate aim is to gradually ease them into the agency.

Phil Dukarsky, SEO lead at Dubai-based SEO Sherpa, leverages a buddy system to ensure that new starters are given the best introduction. Effectively, somebody from the same department is chosen to take this person under their wing and induct them into the department and the wider business.

Emma Welland, founder of paid media agency House of Performance, emphasizes a similar approach with a twist: “We assign everyone a mentor as well as a manager to make sure they have multiple people to check in with and speak to from day one.” They also make sure new employees have time with the founders on a weekly basis to ask questions and get extra support.

Use The Right Tool Kit

I’ve spoken to many digital agency founders and hiring managers, and many have their own nuanced tool stack to ensure that their onboarding is on point.

Zoe Blogg was the first to recommend ClickUp as a project management platform that has been adopted by businesses all over the world.

She explains: “We use the tool to centralise everything from training materials to role-specific onboarding tasks.”

“A key feature we leverage is a dedicated ‘sandbox’ space, where new team members can test ideas, experiment with workflows, and familiarise themselves with our systems in a low-pressure environment before making live changes,” she shares.

Systems like this provide central spaces for new employees to get to grips with existing workflows and ways of working very early on, so they’re not in the dark. This also offers them the chance to ask questions and even make suggestions for improvements, making them feel valued early on.

Kristi Hoyle of Kaizen Search uses ClickUp in combination with Notion, another project management tool, to centralize all learning resources, induction documents, and educational resources.

Vervaunt was the only agency that cited Asana as a key onboarding tool.

Bethan Rainford, the company’s general manager, shares: “We use Asana across Vervaunt and have a comprehensive on-boarding flow which all new starters enroll within.”

Tools For Positive And Negative Feedback

Kaizen Search is an agency that takes considerable steps to continuously improve its employee experiences.

It uses 15Five, a performance management tool that enables new starters to record confidential feedback on their onboarding experience, helping the agency record any shortcomings or

needs for improvement.

Emma Welland takes a similar proactive approach to this at House of Performance: “We ask every new joiner for feedback on the joining process, so we can evolve it.” She expects their process to be even more advanced over the next 12 months.

This is actually worlds apart from some of the experiences I’ve been told about.

Of the seven people who left their roles before probation, only one was even given an exit interview with an opportunity to give their feedback, while the rest were never asked what had gone wrong.

In fact, some of the hiring managers refused to acknowledge any feedback given by the employees.

CharlieHR

Zoe shares that CharlieHR helps them make the heavy administrative side of onboarding more efficient.

It also gives new starters immediate access to key information early on, such as company benefits, perks, and policies. “This removes the logistical friction and allows them to focus on integrating into the team”, says Blogg.

Jen Wlodyka, who heads up the talent team at London and Hertfordshire-based Distinctly Digital, also praises the tool for its ability to schedule performance reviews and ensure that detailed feedback is created and distributed privately and timely. This is vital for keeping staff happy and loyal.

Breathe HR

Breathe is another solid tool for onboarding.

Olivia Royce, the operations director at ecommerce SEO agency NOVOS, explains, “We rely on tools such as ClickUp for task management, BreatheHR for HR processes, and Assembly for

fostering team connections. Cybersecurity training during the first week equips our team to handle IT security.”

Jen Wlodyka also stresses the importance of having the right tools for success.

She points to Slack and their bespoke intranet as vital for smooth communication from the start. Both platforms serve as the company’s centralised hub for policy documents, internal communication between teams, and regular company updates, making new starters feel included right away.

Onboarding Shouldn’t Stop After 2-4 Weeks

Many agencies and brands see onboarding as a short, 30-day process, but that’s not enough. Here’s what the best agencies are doing in that respect:

Rolling Inductions

Zoe Blog from Reboot addresses this head-on as she tells us, “We recognise that onboarding is more than your ‘first month’. That’s why we have rolling induction slots in the calendar, so if someone wants a refresher or misses a session, they can easily join again. This ensures that information isn’t just received once and forgotten – it’s reinforced in a way that makes it stick.”

The 30/60/90-Day Approach

The ecommerce-focused agency NOVOS adopts a structured approach to onboarding.

Its 1-30-60-90-day plan aligns with probation periods and breaks the process into clear milestones: a structure for day 1, week 1, and months 1, 2, and 3.

Olivia Royce, the company's operations director, explains, "We have a clear onboarding process in our task management system which outlines who is responsible for what during the onboarding process."

This structured approach consists of a comprehensive introduction to the company and its mission, vision, and values, and helps set personalized KPIs that match the employee's development areas for the first three months.

Bethan Rainford from Vervaunt outlines their ongoing approach that ensures onboarding doesn't end after probation: "At the end of a probationary period, we have a tradition of 'end of probation presentation'."

They started this when they were a team of five, and now at 65, it still continues.

She goes on to explain the process: "The employee presents back to the full team on a topic they are passionate about or a key project they have worked on during their initial time here. We've always found this to be a really rewarding and supportive way for new team members to close up on their probation, and the support and encouragement from the wider team is always really lovely to see."

Onboarding Should Start Before Day One

Kristi Hoyle from Kaizen Search explains that their onboarding actually starts before an employee even steps foot in the office: "Our process begins two weeks before their official start date to ensure employees feel informed, prepared, and welcomed."

She breaks this down in detail:

Pre-Start Preparation

Hoyle describes how 14 weeks prior to starting, new hires are given a comprehensive welcome deck they're encouraged to look over in detail.

The document includes key company information, details on benefits and key policies, a full organization structure chart, short bios and photos of everybody in the company, and a comprehensive outline of what to expect from day one, including training schedules and full immersion sessions.

Emma Welland shares a similar philosophy: "When we bring new people into House of Performance, we make sure our onboarding starts before they walk through the door, whether that is inviting them to any company events we have in the lead-up to their start date or a simple email answering all those little questions such as 'what should I wear?', 'who am I working with', 'where do I get lunch on my first day', etc."

As Hoyle points out, this proactive approach ensures new hires arrive feeling comfortable, informed, and excited for their first day. She then goes on to outline the full and detailed itinerary.

Day 1 Experience

"On their first day, new employees receive an HR onboarding session introducing them to our core systems, including 15Five, Breathe HR, and ClickUp. We aim to align new starter dates where possible to deliver these sessions efficiently in group settings. New joiners also enjoy a welcome lunch with their manager and buddy to foster early connections," she explains.

Similarly, at House of Performance, they always start new joiners at 10 a.m., when the rest of the company is already in the office and set up. This creates a smooth entry, avoiding

the common situation of arriving on time only to find that managers aren't there.

Welland goes on to say: "We always go out for lunch on the first day, and try and ensure there is some social event in their first few weeks so they can start building relationships (an integral part of account management life!)."

First Week Focus

Hoyle goes on to say that the first seven days are centred around training, with new joiners gradually taking on client tasks designed as learning exercises.

This structured approach allows them to contribute early without pressure, ensuring mistakes are treated as learning opportunities with full support from their line manager and buddy.

New starters also have a values session with the CEO to better understand the behaviors expected of them and the culture they are trying to build from the start.

Check-Ins And Progress Tracking

Midway through onboarding, Hoyle and the directors at Kaizen conduct a formal HR check-in to assess how the role aligns with expectations and identify any points of friction.

Monthly probation check-ins track progress against probation goals to ensure success.

Refreshingly, this agency views probation as a two-way process, using this time to gather feedback and make adjustments where needed.

Jennifer Wlodyka also advocates for regular check-ins, stating that they prioritize ongoing support with daily check-ins throughout the onboarding process and weekly meetings with

their managers. And they don't stop there!

New starters are also invited to monthly reviews for the first six months, giving them the opportunity to share their thoughts about the process, too.

Top Tips For A Smooth And Effective Onboarding

In my experience as a former marketer, hiring manager, and now a recruiter for the space, I recommend the following:

- Take the time to map your onboarding process carefully and tailor it to the size you are currently at – it's not a one-size-fits-all.
- Certain tasks can be automated using the key management tools cited above.
- Speak to new starters and ask them for feedback early on, during, and after their onboarding to keep improving.
- Don't let one single person handle onboarding. Get the whole team involved so new hires feel truly welcomed.
- Encourage the entire business to partake in onboarding in some way by involving reps from every department. This will display a genuine desire to make new starters feel at home.
- Take it slow. Onboarding can feel overwhelming for new members of staff, so spread it out. The NOVOS 30/60/90 day approach is a prime example of how it's a marathon and not a sprint.

Olivia Royce sums it up: "When it comes to onboarding digital marketing talent, effective onboarding serves as the launchpad for success."

Emma Welland explains the emotional aspect perfectly: "I fundamentally believe a good onboarding is judged by how you

make someone feel. For us, making sure expectations are clear from day one, is a big part of this. We want people to feel comfortable asking questions (there are no silly questions) and getting involved.”

A well-structured onboarding process, tailored to individual roles and supported by the right technology, empowers digital marketing talent.

By investing in onboarding, agencies and companies can nurture talent and drive remarkable outcomes in the fast-moving digital world.

More Resources:

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<https://www.searchenginejournal.com/how-to-onboard-digital-marketing-talent-according-to-agency-leaders/542900/>