New Team Onboarding Checklist (First Week Setup)

Admin · https://coreel.ai/help/new-team-onboarding-checklist-first-week-setup/

Use this checklist to onboard new users quickly and consistently.

Day 1: Account and Access

- Confirm invite email received
- Complete password setup
- Log in successfully
- Verify assigned role (Owner/Manager/User)

Day 1: Integrations and Permissions

- Confirm at least one active integration
- Validate camera/mic permissions
- Confirm extension access policy for org

Day 2: First Content

- Record first intro video (30–60 sec)
- Save and verify in My Videos
- Create one reusable template in My Emails

Day 3: First Send

- Send internal test to teammate
- Confirm rendering and tracking

- Adjust thumbnail/snippet style as needed

Day 4–5: Production Readiness

- Create 2–3 persona-specific templates
- Finalize CTA style
- Document team naming conventions and sender account policy

Manager Sign-Off

- User can record, insert, send, and track without help
- User follows role/tier policies
- User knows troubleshooting basics