



Hiring Manager Onboarding Checklist

This checklist outlines the required steps to prepare for and onboard a new hire at CeriFi. It ensures a consistent, high-quality experience and enables new hires to ramp quickly and effectively.

Send Offer Letter:

☒ *Submit an offer request form to initiate the offer letter process:*

- Include all required details for HR to generate the offer
- Start date must be at least 10 days from submission

Once Offer Letter is Signed and the Background Check has Cleared:

☒ *Prepare workspace:*

- Complete the Onboarding Form, which will be routed to IT to provision the new hire's workspace, supplies and system access
- Add the new hire to all relevant Slack channels (e.g., General, IT Notifications, team-specific channels)

☒ *Send the new hire a welcome email and schedule a check-in call:*

- When you receive notice that your new hire's background check is complete, send a welcome email that includes their start date and time. Then, schedule a brief check-in call prior to Day 1 to confirm they've received their equipment, can access all systems, and to answer any questions they may have before starting

☒ *Create the new hire's first-week schedule:*

- Create the new hire's first week schedule which must include:
 - 1:1 meeting with manager
 - 1:1 meetings with team members
 - 1:1 meetings with key stakeholders
 - Onboarding Training in LMS
 - Systems trainings

As a manager, you own the success of your new hire's onboarding. You are responsible for ensuring all onboarding steps are completed and that your new hire is onboarded effectively and efficiently.

Day 1:

☒ *Host a 1:1 meeting with your new hire:*

- Welcome the new hire
- Review role expectations
- Share the team guidelines and manager manual
- Share the new hire's first-week schedule



☒ *Host a team meeting:*

- Welcome and introduce the new hire
- Invite team members to introduce themselves, their roles, and how they will collaborate on assignments

☒ *Create a welcome post on slack channel:*

- Introduce the new hire in the General Slack channel, as well as any relevant team-specific channels. Provide a general welcome to CeriFi, followed by a brief introduction highlighting the new hire's background, role, areas of focus, and any personal details they are comfortable sharing

Day 2-3:

☒ *Support your new hire in becoming familiar with CeriFi:*

- Check-in daily with them to answer any questions they may have

☒ *Conduct a 2nd-day check-in meeting to:*

- Provide a high-level role overview of what work they own, what success looks like and review any immediate priorities
- Provide training on systems and tools used for immediate priorities
- Answer any questions they may have

☒ *Conduct further 1:1 meetings to:*

- Provide further training on systems and tools used within the department or role
- Familiarize the new hire with company policies and procedures

First Month:

☒ *Conduct performance & goal setting meeting:*

- Define their performance expectations and early goal setting
- Establish 30/60/90-day goals aligned to role expectations and key priorities
- Address any questions or concerns

☒ *Maintain consistent weekly 1:1's:*

- Gather feedback on the new hire's onboarding experience
- Discuss tasks, current priorities, and upcoming projects
- Clarify gaps and answer any questions
- Provide specific, actionable feedback (e.g., what is going well, areas of improvement)
- Provide any resources or support needed for success