

## Checklist Prior to Making a Hire

- Complete Organization Chart to help understand needs of the business.
  - Include the following:
    - Name
    - Title
    - Licenses
    - Reports to
    - Leadership role (s)
    - Responsibilities
    - Future Role & Responsibilities
    - Back Fill
    - Issues needed off their plate
- Determine the responsibilities & expectations of the open position.
  - Start with a bullet point list of items; that you want off your responsibility list, business needs that are not being met currently and the wish list of, “I wish I had time for this”.
- Research the average salary in your area for this type of role
- Determine the budget for this role (keep in mind salary, bonus, benefits, operational costs)
- The ideal start date for new employee
  - Accounting for training/ramp up period
  - When they are expected to be fully functional in their role
  - Assign the designated person to train and then manage
- What is the company expectations on work environment, Virtual/Hybrid/in office full time
  - If working from home or virtual-do you provide computer, etc.
- Write a job description based on bullet points above
- Define your selection process
  - Who is part of the interview process
  - Who helps make a hiring decision
    - Do you have offer letters?
  - Any assessments given and at what time in the process
  - Ideal timeline
  - Virtual interviews or in person
  - What questions need to be answered and asked
  - Review actual job description with candidate to fully explain what each aspect means-want to have VERY clear expectations
- Office manual
- Onboarding checklist
  - Determine who oversees what responsibilities when there is a new hire
  - Create a training schedule for at least their first week
    - Remember training needs to be repetitive and lots of observation!