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A Step-by-Step Holistic Guide to Hiring Your First CPG Employee(s)

A Fabulous Tool Kit!

In collaborative partnership: by be the change HR, Inc.

&

Orchid Holistic Search

be the change HR, Inc. & Orchid Holistic Search proudly present a fabulous tool kit.

A Step-by-Step Holistic Guide to Hiring Your First CPG Employee(s)

A message from LeiLani Quiray, CEO of be the change HR and Angela Marturano, President of Orchid Holistic Search:

We are so excited you're hiring your first employee(s). Bravo/a on the next step in growing your Consumer Packaged Goods (CPG) business! It's a beautiful thing to provide your employees with a great work experience, and this guide will help you not only think holistically about your work culture and foundation, but also point you in the right direction to create a happy, healthy and FUN workplace.

We hope you find this guide more than helpful and if you ever need more guidance, we're just a call away!

Happy Hiring!

With Gratitude,

LeiLani & Angela

This is your guide

This guide represents a desire to serve our clients and make a social impact through innovative products and services.

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Orchid Holistic Search is a boutique executive search firm specializing in filling roles for startups and emerging brands in the natural consumer packaged goods industry. We focus on providing our clients tailored, customized and thoughtful search service, filling Director through C-suite roles, across functions. We believe that work is one of the most important facets of our lives, and that leaning into purpose driven, impactful work is a true gift. We're here to help make your hiring process a joy. Visit our website: Orchid Holistic Search

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Enjoy!

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ABOUT THIS GUIDE

This is your guide to hiring amazing employees who are thrilled to be a part of your business. Use it as a *guiding light* to how you think about hiring, how you'll create your recruitment, selection, and onboarding plan, and meet your new legal obligations as an employer.

This guide has six parts that build on each other for a comprehensive approach to helping you complete the hiring process and adding new employees to your team. Not just *new* employees - but *AMAZING* people. You deserve the best!

This guide provides a best practice approach for bringing employees on board for the first time. The steps in this guide make the hiring process easy and are based on industry standards and legal compliance requirements. It gives you information on what to do before you begin your search, steps to take during your search, how to navigate the selection process; and ultimately how to integrate your new employee into your company. This guide is filled with A LOT of information, tools, and resources for you to use immediately.

That said, this guide is not intended to provide an A through Z approach for interacting with your employees throughout the entire *employee life cycle*. You'll learn more about the *employee life cycle* in the Introduction section that follows.

The target audience who may benefit the most from this guide is made up of small businesses and start-ups in CPG who are ready to grow and hire new employees.

We hope you enjoy the read, as it is our pleasure to provide you with a valuable tool-kit.

INTRODUCTION

“Good-to-great transformations never happened in one fell swoop....[it comes about] in a cumulative process--step by step, action by action, decision by decision, turn by turn of the flywheel--that adds up to sustained and spectacular results.”

“People are not your most important asset. The *right* people are.”

- James C. Collins (*Good to Great: Why Some Companies Make the Leap... and Others Don't*)

Congratulations on taking the next step to grow your business! This can be both an exciting and overwhelming time. You know you need to hire, but may not be sure you have everything in place to do so. Don't worry, whether you've got a good handle on the next steps, or need a step by step process, we've got you covered. We'll make sure by the time you're done with this guide, you feel confident, you're excited on the next steps, AND you're compliant. PHEW!

This guide points you in the right direction to think through your team building holistically as well as deal with these compliance issues.

On to the fun part!

Let's start with the very basics first:

- Do you have a vision for your company?
- Do you have an idea of how you will get from where you are today to there?
- What are your strengths as a founder? How about weaknesses? This is where we begin to identify the opportunities to make great hiring decisions.

Your goal:

To flush out your employer brand and develop your unique hiring process to get the *right* people on board.

Your challenge:

- To get crystal clear on what *exactly* are your business goals and objectives.
- To make sure your vision, mission and core values support your business goals and objectives.
- To know how you would like to shape your company culture.
- To always go back to your goals, mission, and values when taking action on a new strategy, like becoming an employer of choice who attracts and keeps the best talent!

And then, the more technical parts and pieces. You might be wondering:

1. What legal obligations must I meet as an employer?
2. How do I handle payroll and taxes - should I outsource this?
3. What about human resources - in-house or outsource?
4. What does a job analysis entail - is it necessary?
5. How competitive is my pay - should I offer benefits and what if I don't yet qualify for a group healthcare plan?
6. How do I write a job description and market the job?
7. Should I hire employees, independent contractors, or even bring on a co-founder?
8. What policies and procedures should I have?
9. How do I interview and select the *right* employee?
10. How do I handle orientation and onboarding?

If these questions sound familiar, then you're in the right place.

When you think about the hiring process, think about it in terms of building a *relationship* with your new employee. Having them join your team is the first stage of the relationship. You both are in it together. *Your* job is to guide them through the various stages of the employer-employee relationship.

This is what we call the *employee life cycle*. The *employee life cycle* is a concept in human resources management that describes the stages that an employee goes through at different points in your organization and the role you play at each stage.

Here's a typical *employee life cycle*:

1. Recruitment.
2. Orientation.
3. Onboarding.
4. Retention.
 - a. Career Development.
 - b. Performance Management.
 - c. Engage and Motivate.
 - d. Recognition.
5. Separation.

The *employee life cycle* is real and it is your job to understand how you interact with your employees at every stage of this cycle. The guide provides specific steps at multiple stages that you can take to create a relationship that is positive, productive and supportive of your business needs.

Here's a typical hiring process:

The hiring process looks something like this. First, you identify what your greatest need is. Next, you create a job description. The job description will turn into a job announcement/ad that you post and market. You will then review applicants, interview and select the best candidate for the position. Once you've selected who you want to hire, you will make a job offer. After the candidate has accepted your offer you bring them into your organization. Finally you will provide an orientation, complete all required paperwork, and begin the onboarding process. Are you breathing? Take a breath. It's easier than it seems, and you've got this handbook, so no need to stress!

The hiring process is a major part of the Recruitment stage of the *employee life cycle*.

As you read on, you'll discover that the steps presented in this guide are meant to complement and align with the *employee life cycle*.

PART ONE: REGENERATIVE HIRING PHILOSOPHY & A PRE-HIRING CHECKLIST

“Growth is never by mere chance; it is the result of forces working together.”

- James Cash Penney (*Founder of JCPenney stores*)

Candidates typically aren't looking for just ANY job. They're looking for a place to contribute where they feel valued and appreciated, and their life outside of work is taken into consideration. Research and decades of experience with executive search and speaking with candidates across all levels, from entry positions to the C-suite, it's crystal clear: people yearn to feel valued and appreciated, to pursue work that aligns with their values, and to be compensated fairly for their contributions.

Employers of choice are those who build a really beautiful culture and employer brand that reflects their external brand. If your aim is to build a successful company with longevity, a great culture and a best in class internal brand, it's important to think about the employee lifecycle within your organization from a *holistic* perspective, early and often.

A REGENERATIVE APPROACH

In agriculture “regenerative” means to farm in such a way to protect the environment, aid and expand natural resources and to make the best use of nonrenewable resources. In business, we can use this same term when we are looking to create a meaningful, enriching workplace where we can build PEOPLE up at the same time as our company.

WHY regenerative? Well, when we take care of our people, they thrive. They are happy. Grateful. They're better at their work. They build upon that positivity by helping to create a culture that is exuded outwards. Eventually, when a great workplace culture is recognized, it means people WANT to come work for you, they want to do business with you. Hiring gets much easier and better. You may receive community or industry accolades. You become a respected and reputable place to work. It all starts with the initial step of hiring, so we cannot

overlook how foundational this stage is, and how investing time and resources in building the right culture early on will pay dividends in the long run.

BUILDING CULTURE: YOUR FOUNDATION

Let's use the analogy of soil being the cultural foundation of a company. Soil is as foundational to farming as culture is to the success of an organization. Let's dig into how to build that from the ground up...and first talk about dirt. Yep, dirt.

Let's look at two farms:

Farm 1: Soil is with one type of GMO seed to produce a single crop (monoculture), consistently sprayed with fertilizers, pesticides, bactericides, herbicides etc. to keep the creatures and weeds away. This farm implements rigid protocols and high-tech systems that run on a weekly, monthly basis because: "that's how we do it, that's how we've always done it." The crops may thrive for a season, but long term this creates an extractive culture and toxic environment where seeds go to produce at all costs and then wither and die... Long term impact is that the soil is highly productive in the short term, but season after season of hard-driving production and tilling and chemical use has an impact: the soil is foundationally destroyed over time. All of its natural mycelium, beneficial bacterias, organic matter, oxygen flow, nutrients are depleted and what could have been a rich soil is essentially turned to dust. No other plants or creatures live here. Eventually the whole field (company) is bought on the cheap to roll into another farm. 🦠😭☠️🚜

Farm 2: Soil is tended carefully, monitored to understand its natural makeup. It is observed carefully and seeds are sown where soil will best receive them: bee balm where there is more clay, lavender and rosemary in the sandy side and tomatoes where the soil is loamy. This farm is built & fed with a diversity of inputs like organic matter, beneficial microbes, compost teas, and nutrients to produce a beautiful, rich and healthy foundation. This farm is routinely monitored for water needs and tested for overall soil health; foundationally preparing to be flexible and adaptable to meet the growth plans and to receive a bounty. After a season of hard production, the soil is often left to rest with a cover crop that restores its nitrogen. This creates over time a dynamic and rich environment where a variety of seeds are nurtured, abundant & thriving in a multitude of ways

for all of nature to safely enjoy. Naturally, this attracts many pollinators like bats, butterflies and bees. Over time a beautiful, healthy ecosystem is built and this farm looks like a garden of eden. It's very productive, but not at the expense of the community. 🦋 ✨ 🍒 💰 ❤️

Apply this approach to people & culture. We have the incredibly exciting opportunity as leaders and founders to make *exactly* what we wish out of our foundation.

CULTURE MATTERS

What is company culture? And how do we apply "inputs" from our regenerative farming analogy here? Culture is multifaceted & refers to the shared values, beliefs, norms, behaviors, and practices that characterize a specific workplace or company. It's essentially the "personality" of the organization, shaping how employees interact, make decisions, and carry out their work. It's behavior that emanates through the organization and also externally to the organization. Keep in mind that founder/co-founder/CEO/GM is creating culture prior to making hires; on day one. This extends beyond your organization to how the company engages with contractors, agencies and any external partners. Oftentimes, leaders will say "we have a good culture." Well what exactly does that mean and how can we better define it?

Some aspects that make up culture:

- Mission, Vision: have a statement talking about purpose and goals.
- Leadership style - what are the communication styles, decision-making processes?
- Communication patterns including timing and expectations of work hours.
- Recognition, appreciation and awards.
- Compensation, promotions and growth within the organization.
- Benefits. This is a biggie for candidates. Things like promoting flexibility in the workspace i.e. asynchronous working schedules, remote-friendly are great. Benefits that include mental health care, maternity/paternity leave, flex time, Unlimited PTO, wellness benefits like gym memberships, team retreats or wellness days, book clubs, philanthropy days, regular team standups, educational reimbursements and more.
- Ethos: how do we treat our partners? What philanthropic or social justice efforts will we make?

- Values, so very important to define, so more on that in a bit.

EMPLOYEE LIFECYCLE, SEED TO SEED HIRING

As we outlined, in standard HR Employee Lifecycle, the stages are: Recruitment, Orientation, Onboarding, Retention (Career Development, Performance Management, Engage and Motivate, Recognize) and finally, Separation. We aren't typical though, so let's go deeper and think about this in a different framework: a seed-to-seed employee lifecycle.

Are you familiar with the concept of seed-to-seed production? Basically means that we're allowing some of our veggies to produce their valuable seeds, collecting them, preserving them, and using them for the next harvest. The analogy here is that each person/employee coming into your organization is a seed, and leaves as a seed. If we're all looking at the goal of becoming a true best-in-class organization that others look up to, we can think of this analogy.

Here are the stages:

Seed - recruitment, orientation.

Root - onboarding, cultural integration into team & mission vision and values.

Stem - meaningful engaged work; taking projects to the completion of something tangible (new account or channel, strategy, innovation, rebrand).

Branch - stage where they are developing things that are being incorporated into other projects that are integrated.

Flower - External brand in market reflective of the brand (invited as industry experts to speak, be on podcasts, showcase what they've done for your brand externally).

Fruit - mentoring, uplifting others, developing the org at a higher level, replacing themselves as leaders, having a unified team.

Seed - reflection of production that goes to another company. An "essence" that is attractive to other companies; seeding their org. When the founders and leadership team has been able to replace themselves via succession planning and training.

Some examples of cultures in our industry and adjacent providing the highest quality most sought after quality seeds are Chobani, KIND, Dr. Bronner's, Vega, Patagonia, etc.

VALUES

We talk a lot about values but should get clear on what the guiding principles and ethics are and they should be actionable. This is going to come up in the hiring process, as it should. So, we should be clear on our values early on. This activity should be done within the leadership team starting with the founder(s). Align around values that are MEANINGFUL and actionable in an organization.

- Example of a poor one: “we are family first” when the company has no maternity leave policy.
- **Examples of good ones:**
 - Intentionality - holistically reviewing business decisions as they come up; i.e. not going into Costco immediately just because they called.
 - Congruence - make sure that everyone on the bus knows the end destination and how their part matters along the journey.

HIRING WITH BIGGER PICTURE IN MIND

What happens when we lead a GREAT hiring process? First and most obviously, the more intentional a hiring process, the better the hiring outcome. More so than that, especially the CPG space, we actually have an opportunity to create a LOYAL BASE OF FANS from every candidate pool. Seriously! Two scenarios to compare:

- 1) **Company X** leads a standard spray-n-pray inbound approach. They put the job out on LinkedIn or Indeed, get 729 applicants. Undoubtedly 90% are not a fit at all, 9% are potential matches and 1% are good to great candidates. What happens next? Internal team is overwhelmed going through the applicants. Candidates get either no response, or a generic one. Even the several candidates who get interviews may or may not get a response at all or closure on their process. The process drags out for months, candidates may even see it get reposted if the right candidate was not identified. It is certainly a numbers game, and leaves candidates feeling like a number. In a tight-knit industry, people talk. People certainly talk if they are left hanging or feeling ghosted by a company.

2) **Company Z** engages an executive search partner* to fill their position. The search firm may or may not advertise the role publically. They use a *strategic* approach to build a potential list of industry companies from which to source from, write a compelling ad and job description, and expertly reach out 1:1 to each candidate to discuss a potential match. The search firm stewards the process and responds to each candidate. The pool of 5 candidates they present are sent product samples during the process, are kept in the loop and either hired, or let go with care. What do you think happens when the entire candidate pool is kept small and tailored, and treated with care? You guessed it. While 4/5 candidates were not offered roles, they are left with a solid impression, a great experience with the company and become brand loyalists and customers within a tight knit community.

*Not all roles are necessary to send to a third party search firm. A company CAN deliver a similar experience if they elect someone within their team to steward the process.

ROADMAPPING YOUR CPG BRAND HIRING

The first step in building a hiring roadmap is to *intentionally* understand and be able to communicate the real needs of the business today and in 12-24 months, and how this translates to each function. What are the must have values, behaviors, traits and experiences you're calling in and what is the go-to-market strategy?

PRE-REVENUE to \$1M - basically, you exist and survive based on founders skill set assessment. This is a time to leverage entry level or part-time help, and think about a co-founder or other equity heavy leadership help.

EARLY STAGE (\$1-10M) - Based on a founder's skills assessment, this will be a stage to leverage agencies & consultants and then build your first team. You're going to be scrappier here when you make your first hires; you'll look for hungry, mission-aligned people who can wear many hats. Sometimes they are more inexpensive or earlier career folks who are equity driven.

GROWTH STAGE (\$10-50M) Hire based on strategic Business Goals, Go to Market Strategy. This is a stage to hire folks with startup expertise.

Growth stage companies need to be thinking ahead and hiring for the company they will be in 18-24 months, better to have someone experienced enough to be doing the work and also

thinking ahead strategically than someone who will be in over their head as the company is growing. Sourcing candidates from companies that have the "seed" culture you're after or have been where you're going, revenue or innovation wise can be one effective strategy. In any case, never skip on cultural/values alignment.

BIODIVERSITY & DEIB

Back to nature analogies for a moment! Biodiversity in an ecosystem helps resiliency of the ecosystem, purity of water and soil health, regulation of climate and happiness/wellbeing of people, plants and animals.

This is also true within organizations. We're not only talking about gender/sexual identity/culture/race/religion but lived experiences as well. There are few ways to naturally attract diverse groups of applicants:

- Be careful about sourcing just from within your own networks, existing inner circle: friends & family, employee & investor networks. This invites major bias and homogenous talent pools.
- Be transparent about your company's demographics even if they have room to be improved upon. Measuring is the first step.
- Be vulnerable about weak spots which signals to candidates can also be vulnerable; this builds cultural belonging.
- Integrate diversity imperatives into a statement on job description and website. That is, take a few words to talk about qualities you're seeking. WE're seeking these types of people with these qualities. Personalize, and if you're truly welcoming to all genders, groups, let people know you welcome them. Example: <https://wearerasa.notion.site/wearerasa/Welcome-to-Rasa-s-Job-Board-0acacb1690b54025bf98fe515305735f>. *Note: It's essential to ensure that your actions align with any diversity statements you make, as failing to do so can undermine your brand reputation.*
- Highlight diverse benefits on your comp packages. This could be anything from childcare stipends or onsite care, continued education, reimbursement, mentoring programs and executive coaching.
- "Be aware of culture defining perks. Ie. if you're offering beer and a game room, what image does that immediately conjure?" - Stacey Gordon (div/inclusive leader)

- Employee endorsements. Leverage wins to attract talent. Glassdoor reviews. Offer candidates the opportunity to connect other employees in the company for references (could be a part of the interview).
- Conscious language, gender decoders in JD. Words like “unparalleled” or other over-exuberant language. The term “Rockstar” does not feel inclusive to many people. Consciously speak to people; human to human.
- Include possible career trajectories - well defined path to advancement, forward looking statement for what could be on the horizon to the team.
- Make sure information is available about the onboarding process, any resource groups industry specific ways to bring people together to form camaraderie; inclusive activities.
- Work with a DEIB consultant to build a roadmap. This signals to candidates that it's a truly integrated business goal and not just lip service.

YOUR PRE-HIRE CHECKLIST

You might be wondering: Am I ready to begin the hiring process? Where and how do I start?

1. Get Your Employer Identification Number (EIN)

When you hire your first awesome person, you must get an EIN to use on tax returns and other documents you submit to the IRS. To get your EIN, you must file [IRS Form SS-4](#).

2. Get Your Business License and Permits

If you don't already have this, get it now. Check your local town/county on required documents and process. Depending on the nature of your business you may also need permits. Check out the [SBA website](#) for more information, as well as your city's website. **Please note:** it can take up to 8 weeks for a business license to be approved, so plan accordingly.

3. Register with your State's Unemployment Insurance (SUI)

Once you get your perfect employee, you'll have to pay SUI taxes (also known as SUTA taxes - State Unemployment Tax Act). These payments go to the state agency responsible for collecting your payroll SUI tax payment. SUI funds provide short-term relief to workers who lose their jobs. To establish your payroll tax account, identify your state's labor department [HERE](#) and register.

4. Get Workers' Comp Insurance

You'll need workers' compensation coverage to protect your people who might suffer an on-the-job injury or illness. Learn more [HERE](#).

5. Get Employment Practices Liability Insurance (EPLI)

EPLI is optional. This insurance provides you with coverage against claims made by employees alleging discrimination (based on sex, race, age or disability, for example), wrongful termination, harassment and other employment-related issues, such as failure to promote. Learn more [HERE](#).

6. Oh, joy! Taxes. Set up Your Payroll System to Withhold Taxes

A word about accurate timekeeping. You'll need to track all of your non-exempt, hourly employee's time so that you pay them for all the hours worked and any overtime. Different rules apply to exempt, salary employees (*be the change HR can provide additional guidance on nonexempt vs. exempt*). We recommend using an automated system to keep you on track and compliant. Good news is most payroll systems provide this feature as part of their services.

And now to setting up your payroll system:

You have two options when it comes to taxes. One is to go at it on your own and handle everything yourself, and the second is for a payroll provider to do it.

If you want to do it on your own, you'll need to deposit federal income tax withheld and both the employer and employee social security and Medicare taxes. You'll need to report on the taxes you deposit, as well as report wages,

tips and other compensation paid to your people. To learn more, get [Publication 15 \(2020\), \(Circular E\), Employer's Tax Guide](#).

You'll also need to withhold SUI taxes (SUTA taxes) so be sure to verify with your state on how these payroll taxes are handled.

The second option you have, if you prefer NOT doing this on your own; is to select a payroll provider that does all of this for you. Providers exist for all sizes of companies, and can grow with your company's needs. The nice thing about this, is that since they take care of all of the taxes it reduces time spent on payroll and minimizes tax errors. Here is a list of potential providers that offer different solutions to fit your needs: [Payday](#), [Paycom](#), [Heartland](#), [Paylocity](#), [Gusto](#), [SurePayroll](#) and [Paychex](#). *be the change HR* is not affiliated with any one of these companies. We recommend that you do your own research and comparisons to find what solution best fits your unique needs and budget.

be the change HR is happy to make recommendations to you for a local payroll company that can meet your needs - contact us today to get more info!

7. Evaluate the Job You Need to Fill

Take a breath. We know the last few steps probably felt a bit overwhelming. Here's the fun part, figuring out the job you need to fill! To start, you'll need to review your business goals and objectives to create a job that *aligns* with your needs. What's on your plate that you can delegate? What are tasks that currently take a lot of your time that you need to free up? Is there something that is administrative that could use someone else with experience? Does the amount of work require a part-time or full-time position? Start with these questions to get the juices flowing.

Now, let's begin the process by using this tool in Part Six, [Job Description Questionnaire](#). You'll need this in Part Two, so now is a good time to get a head start and see what you really need and what the role will look like.

If you were able to do the Job Description Questionnaire above, let's keep going and determine the pay range for the role. If you didn't do the step above yet, that's ok. Just keep in mind, you'll also need to establish a competitive pay range to attract top talent. Not sure how to do that? Don't worry, we've got you covered - we're here to be of service. This online resource provides good information, [*The Definitive Guide to Creating a Comp Plan.*](#)

This step has a lot of moving parts - so feel free to contact us for help!

8. Set up Your Employee Benefits

If you're offering benefits, like health or retirement, you'll need to create some policies that describe the plans, eligibility, and sign-up procedures so employees can enroll, name their dependents, and select options. If you don't have the expertise in-house, consider working with a benefits broker who specializes in supporting businesses in your industry. They'll also be able to provide you with cost effective solutions for your company and keep you in compliance. A great broker keeps you updated with any changes to keep you in compliance going forward.

9. Make Workplace Safety a Priority

All employers must provide a workplace free from recognized hazards that may cause serious physical harm to their employees and establish an overall plan to keep the workforce free from work-related injuries and illnesses. OSHA (Occupational Safety and Health Act) provides workplace health and safety regulations that are specific to the size of businesses you have and industry you're in. (Check your state to see if they have additional regulations you must comply with.).

The Federal and State regulations call for you to provide a workplace free of hazards, training employees to do their jobs safely, notifying government administrators about serious workplace accidents, and keeping detailed safety records.

[Here](#) is a great resource from OSHA to help you get started with workplace safety compliance.

We **highly recommend** that you work with a consultant familiar with both Federal and State regulations because it can be confusing trying to figure out what regulations apply to your business.

10. Create Your Employee Handbook

Did that title just scare you? If it did, don't worry, you aren't alone. This can feel like a very big task to take on. Your employee handbook describes your employee policies, procedures, work rules, etc. You'll also include stuff like your mission statement, workplace safety program, and benefit plan descriptions. There are a ton of mandatory items that need to be included. Lucky for you we've got it broken down into sections should you reach out to us for help. Also, don't forget this *IS* something you can outsource. Apart from us, there are many attorneys that can help draw this up for your specific business needs, in cost effective terms.

PART TWO: THINGS TO DO TO HIRE AWESOME EMPLOYEES

“My biggest mistake is probably weighing too much on someone's talent and not someone's personality. I think it matters whether someone has a good heart.”

– *Elon Musk (Founder and CEO of Tesla Motors and SpaceX)*

You might be wondering: Okay, so I've done all the steps in Part One and I know what I need help with - I know the job I need to fill. Where do I go from here? Well, let's get the word out!

RECRUITMENT, a Holistic Approach

Recruitment is a process for finding new people to join your organization and help you advance your mission. It can be a daunting task to lead, especially when you're new to hiring. We've put together best practices so you can learn how to hire the best humans for your company, and then create your own, unique recruitment plan.

Here are some big picture themes to align on before moving ahead with a hire:

- How do we ensure our recruitment process attracts candidates from diverse backgrounds and experiences to enrich our team's perspectives and foster an inclusive environment?
- How will hiring this new employee help us grow and achieve our mission and business objectives?
- How will they fit with our company culture, or better yet, what do they *add* to our culture?
- Do they have the personality to get along with our team, our customers?
- Do they have the right skills or have the potential to learn and apply new skills?
- And where do we start?

Independent Contractor v. Employee

Should I hire an independent contractor or an employee? This is the short answer: it depends, and it's complicated. For an overview on hiring independent contractors, go to Part Six, [Hiring an Independent Contractor](#).

RECRUITMENT:

Step 1: Plan & Strategize

This stage is all about defining your hiring goals and your strategy. Some important factors:

- How do you communicate your company's mission and vision?
- How do you communicate what it's like to work in your company? People *really* care about the experience, your commitment to diversity, and culture (and sometimes they care about this more than pay!)
- Will you partner with a staffing firm, or an executive search firm with expertise in your industry or type of position?
- If not, where do you advertise - online recruitment sites, social media?
- What is the pay range? Is there a bonus or equity offered as part of compensation?
- Who will be involved in the hiring process, and are they all on board and in alignment with the process?
- Most importantly: **Creating Your Job Description**

Remember back in Part One, we talked about figuring out what job you need to fill, and what you can get off your plate? If you didn't do this step in Part One, now is the time! If you already did this.... high five! Skip to #2 below.

Creating a well-written and honest job description is super important to your search for the perfect candidate. If you want to attract the *right* people, then it starts with your job description.

To get started, you'll need to review your vision, mission, and core values so that you include them in your job description and later in your job advertisements. Use the information you gathered in the [Job Description Questionnaire](#) to help

you craft your job description. See Part Six, [Sample Job Description](#), to begin the process of writing your own job description.

Step 2: Market & Source

- Sometimes this can feel like the hardest step. What do you say? How do you write it? It's best if you write a job ad that reflects your company and culture and includes details from your job description to attract the *right* type of candidates. Be specific, and let your culture shine through. Tell your founder story. Highlight your mission, vision, values. Are you a fun and relaxed environment? If so, write the ad to highlight that. You could be attracting the wrong type of applicant if you aren't transparent here. Time is money so it's best to be forthcoming with what your company environment is really like. If you're stuck, a quick Google search will provide you with plenty of examples. Use it for motivation, but remember - don't copy it verbatim. That is theirs, and works for their company. Write one that shows what your role and company is all about!
- Now...where do you post your job ad? If you're working with a recruitment firm, they will handle the heavy lifting here for you. If you're going it on your own, there are many websites to choose from to advertise your position. Depending on the job or industry there might be some specific places to post. For most jobs/positions the most popular and effective sites are: [Indeed](#) (has free job postings), [Glassdoor](#), [LinkedIn](#), [Monster](#), and [ZipRecruiter](#). Some examples of more specific sites are [Angel List](#) which is a great place to post for true startups; [Natural Industry Job](#) for sales and more entry level supplement roles. [StartupCPG](#) has a job posting page on their Slack channel. [Dice](#) can be a great place for IT specialists. If you're looking for college recruits you can look at [Simplicity](#) where you can post at multiple colleges at one time! This helps keep costs down as well. [Jopwell](#) is a site focused on BIPOC college students and here are [8 more Great Jobsites](#) catering to diverse applicants. Start with these before you get creative and experiment with other forms of marketing.
- Who will write this job ad? What is our messaging? Which intangible benefits can we highlight to make our opportunity shine?
- How do you ensure your recruitment efforts reach diverse candidate pools, including underrepresented groups, to foster a more inclusive workforce?

- What steps will you take to ensure that your recruitment process is free from bias and discrimination, and how will you promote equal opportunities for all candidates regardless of background?
- Should you advertise a pay range? (Some states may have pay transparency laws that require you to publish pay ranges on job postings, so check with your state to ensure compliance).

Step 3: Screen & Interview

Here, we're screening profiles and interviewing candidates. We have already clearly defined the process, right? Next up, getting key decision makers on the phone with candidates. Some pieces of advice:

- *Read resumes with a grain of salt.* As long as the candidate appears to meet the baseline qualifications, let the first phone call be your first impression over going over resumes with a fine-toothed comb. No preconceived notions of who they are based on the boring resume. Let's meet the actual person first, not the paper.
- Use an 80% - 20% selection criteria to help you screen and evaluate applicants. When you're interviewing candidates, use a systematic selection process that weighs 80% of the candidate's interview responses with how well they fit within your culture and 20% on how well the candidate demonstrates they have the knowledge, skills, and ability to perform the job.
- The majority of your questions and energy (roughly 80%) is spent on evaluating how well a candidate is likely to thrive in your company culture. The rest of your time and energy (roughly 20%) is spent on evaluating how well the candidate answers questions about job qualifications. Job qualifications questions are derived from the job description and are meant to ask candidates about their knowledge, skills, and abilities for performing the essential functions of the job.
- For a sample of "good" and "bad" questions you shouldn't ask in an interview, see Part Six, [Sample Interview Questions](#). (Please look at the [Sample Interview Questions](#), under, "Worst Interview Questions. DO NOT ASK THESE" and remember, do not ask those questions we've listed for you or any other question that may come across as offensive or discriminatory in nature.

- For a sample interview guide see Part Six, [Interview Guide](#).

Tip: use Calendly to avoid back and forth scheduling woes, and to block certain windows for you to focus on these important meetings. Debrief with each interviewer after each round of interviews. Follow up with thank you notes and candidate questions. Important note: MOVE QUICKLY. Great talent doesn't wait around. Move with swiftness when you're sure.

Step 4: Review Top Candidates

Review your candidate finalists as a team, based on the requirements and also the nice-to-haves defined. Remember, you're focusing on cultural alignment or culture-add as well as soft skills, track record and future potential. Remember, you're not hiring people EXACTLY LIKE YOU in a diverse team. Diversity of thought is very important.

Remember, candidates are real people. Get to KNOW who you're talking to. If possible, in person! Show them that you value them with your time and attention. Please don't ghost during or after an interview process.

Ok, so that sounds great, but how do you measure the viability of a candidate against the others? You may decide to include an assessment or a PAID PROJECT as part of a way to evaluate your finalists. You would pay somewhere \$250-1000/project depending on the length and level of the role. This allows a candidate to feel their time was well-spent. Create a spreadsheet and measure every step of the process. We've got our own little scale:

1= No way! I would never hire him/her!

2= I wouldn't hire him/her but you can talk me into it.

3= I would hire him/her but you can talk me out of it.

4= Heck yes! I would definitely hire him/her!

- How did you define culture? Will this person be in harmony with your pace of work, style and values?

- Soft skills are personal attributes that enable someone to interact effectively and harmoniously within your culture. Examples of skills include: interpersonal, leadership, communication, teamwork, and flexibility.
- **Tip:** When you hire for soft skills, you tend to have less behavior issues and more happy team members!
- **Tip:** When you hire for potential, you're trying to determine the ability of the candidate to adapt and succeed in their new role and company culture. You want someone who has the potential to fit and grow with your company.

Step 5: Select Your Person - but BEFORE you make an offer...

The final decision! All parties should have a mutual understanding and your key decision makers should agree with this hire. You will want to make sure you have a close #2 candidate, and keep them engaged until your first choice formally accepts.

Ask candidates to complete an employment application. The application gathers initial information about the applicant. It should be easy to read and only ask questions that are job-related.

Generally, the application includes these items:

- Basic contact information and availability.
- Job history and qualification requirements.
- Education, certification, or license requirements.
- References.
- At-will statement.
- Equal Employment Opportunity (EEO) statement.

Avoid including the following items on your application:

- Don't ask if the applicant is a member of a protected class under EEO laws.
- Don't ask about criminal histories.*
- Don't ask about credit checks (unless it is necessary for the position - more info about this on the next step).
- Don't ask for Social Security numbers because of the threat of identity theft and privacy.

** Asking about someone's criminal history can be tricky legally and needs careful handling. While you can ask in some situations, it's smart to chat with a legal expert first to make sure you're following the rules. Stick to questions that relate to the job, and think about doing background checks later on, following the right steps.*

For a sample application, take a look at Part Six, [Application for Employment](#).

Step 6: Make it real, Make the offer!

Good talent is hard to find! So, if you've made a decision, act quickly and call the candidate and offer the position over the phone. When you speak with the candidate, tell them to expect an email from you with more details and that you look forward to hearing back from them soon. Don't forget to mention that the offer is *contingent* upon the candidate's acceptance of the written offer, references, background check, etc.

Formally offer the position with all of the offered terms & conditions. This is communicated to the chosen candidate in the form of a verbal offer first, and once the shared excitement is confirmed, its followed by a formally written offer letter including all benefits

Remember all of the paperwork you've gotten in order like the offer letter, employee handbook, benefits summary? Time to send it off and await your new employee's signature!

Some states have strict laws prohibiting you from asking questions about criminal history or felony convictions before making a job offer. But once you make your offer, you may run a background check. If the background check comes back with a criminal conviction, then you are required by law to evaluate whether the applicant should still receive the job in light of the severity and nature of the crime and how much time has passed since the conviction. If you decide to rescind the offer, then you must explain in writing to the applicant why you are

rescinding the job offer, provide a copy of the background check, and give the applicant 5 days to respond.

What about consumer credit checks - can I run one as part of my background check process?

It depends. You are limited to the type of job a candidate is being considered for; you just can't run a check on everyone. Consider this best practice approach: Is the candidate being considered for a role that falls into these interrelated positions? 1) a manager, 2) a position that involves access to confidential information (such as financial or security records or trade secrets), 3) a position that involves access to banking information, social security numbers or date of births; or, 4) a position that involves regular access to cash totaling \$10,000 or more.

These are sticky situations that - if not done right - can land you in a heap of troubles, fines, and penalties. So, please feel free to reach out to us as we'll be happy to point you in the right direction.

For a well-written offer letter you can use, see Part Six, [Sample Offer Letter Template](#).

So they've accepted/rejected your offer..now what?

- If they've accepted the offer - CONGRATULATIONS on hiring your first employee! Pat yourself on the back, take a deep breath, and jump forward to our next section on how to onboard your new employee! YAY!
- If they've rejected the offer- that stinks! First, do you know why they rejected the offer? Is it due to compensation/schedule? Is this something you can work with?
- Do you have a second choice that you could do another interview round to help clarify any areas of concern? If yes, great, let's start there. If not, let's go back and review any new applications, or even old ones and restart the process. Don't quit... it's a *process*, but we know you're going to get to that finish line! Let's find the *right* employee, not just any employee!

Step 7: Schedule Orientation and Start Planning the First Day

The start date you agree on is the first day of work and orientation. You'll need to pay your new employee starting on this day. At *minimum*, go over the following items to make sure you have them ready to go for the orientation of your new employee.

Super Important - Make the first day on the job a MEMORABLE EXPERIENCE and include:

- o An awesome welcome message, gift (company swag and/or basket of products, a favorite treat they mentioned in an interview, something *extraordinary*).
- o Plan for introductions to teammates, supervisors, CEO, etc.
- o Go over policies, employee handbook, and organization culture.
- o Make sure their work station, email and any tech they need is already set up or sent out before they start.
- o Review pay and benefits and that they are set up in the system
- o Complete any required internal paperwork.
- o Review your onboarding plan and be prepared to discuss this during orientation so they know what to expect on their first 90 days (and beyond).
- o Have a lunch date available on your calendar. No one likes to be "the new kid" eating by themselves. Offer them the invitation in the morning and if they accept, give them a few local options. For remote hires, provide a gift card and make time to have lunch virtually!
- o You'll need to create a packet that contains all the necessary paperwork and forms that you'll review on day one.
 - To learn more, see Part Six, [New Hire Checklist](#).
- o **Key:** make the first day SPECIAL.
- o Make sure that the tasks of preparing your orientation room, technology needs, work orders, new hire packets (to include your handbook, notices, forms, etc.) are part of someone's job responsibilities.
- o You want to make a good first impression so your set-up and materials need to look professional.
- o **Timeframe:** Get this step done 1-3 days prior to the employee's first day.

- A fantastic book to add to your collection on creating MEMORABLE EXPERIENCES is [The Power of Moments: Why Certain Experiences Have Extraordinary Impact](#) by Chip Heath and Dan Heath.
- Get inspired by viewing Dan Heath talking about [The New Employee First Day Experience](#).

Step 8: The First Day - YAY! Time to Shine!

You have a few different options of how to start your employees' first day. Some like to let them go to their desk if they are in-office, (which might be decorated - no judgment here), while others like to bring the new employee into a conference room and get started with orientation right away. Whatever your preference, remember, new employees are taking everything in. That's why we mentioned in the previous step, *make it memorable*. Send lunch for a remote crew! That said - there's business to be done so let's get to that part of it. We'll leave the timing and special details to you!

- Welcome your new employee! Start the orientation by presenting your onboarding plan to them. Confirm understanding of your onboarding plan to make sure everyone is on the same page with expectations.
- Up first, paperwork. Pull out your trusty [New Hire Checklist](#) and let's start going through each document.
 - Make sure you have a signed copy of the employee's offer letter
 - Make sure employees fill out IRS Form W-4 (Withholding Allowance Certificate). Employees use Form W-4 to tell you how many allowances they are claiming for tax purposes so that you can withhold the correct amount of tax from their paychecks. Get the form [here](#). Employees may complete a new W-4 form each year if they want to change their allowances.
 - Have the employee fill out any required state tax withholding form or certificate.
 - Complete Form I-9 (Employment Eligibility Verification) for each new person you hire. The US Citizenship and Immigration Services (USCIS) requires you to complete Form

I-9 to verify the identity and employment authorization of the people you hire. (This must be done within the first 3 days of employment and you must keep this file for 3 years and make it available for inspection by Immigration and Customs Enforcement.) Get the form [here](#). Keep these forms in a separate I-9 folder and not in personnel files.

- Hand out all remaining documents on the [New Hire Checklist](#), go over any that the employee has questions on, and have the employee sign an "Acknowledgment of Handouts" form that you create that basically states that the employee acknowledges receiving a copy of all the relevant forms as specified in the [New Hire Checklist](#).
- Next, start discussing the importance of having regular communication and check-in opportunities. Let them know what this looks like at your company, and how it will be scheduled.
 - Set an expectation of support to build a positive employer-employee relationship.
 - Your regular, check-in meetings help set the tone for an engaging experience beyond the employee's first day at the job.
- Finally, show them how to login to their computer, email, and any other software they may need to access.
 - Help them to set up their voicemail, we recommend showing them first, handing over written instructions, and a potential script for the message. Then - leave them to it. No one likes an audience.
- Let the employee get settled and poke around a bit. If you planned other events (staff introductions/lunch/foosball game etc) continue on as planned!

Please Note: Steps 7 and 8 focus on the first day - things you need to make sure you do to have a successful first day. The next part, Part Three, focuses on onboarding. As you'll learn, you begin to put your onboarding plan into play on the first day. As you read about onboarding, you may need to come back to Steps 7 and 8 to see how it all fits together.

Report Each New Employee to the Appropriate State Agency or Employee Registry

To ensure compliance with state regulations, it's crucial to report information on all new employees to the State Employee Registry, especially if you're not using a payroll service provider. Some states mandate this reporting to aid in locating parents who owe child support. It's essential to review the specific requirements of your state to stay in line with the law.

If you opt for a payroll service provider, they'll typically handle this reporting along with managing payroll taxes, which can be a convenient option. With this approach, you can avoid the hassle of keeping track of changing requirements and tax laws independently.

Additionally, as part of state employer registration, it's important to check with your state to see if they require any specific forms or procedures during new hire orientation. This ensures compliance with their new hire notification system and helps streamline the onboarding process for new employees.

Set up Your Personnel Files

Create a file for each employee you hire to keep job-related documents, such as job applications, employment offers, IRS Form W-4, and performance evaluations. Keep medical records in a separate, confidential file, in a locked cabinet. File I-9 Forms, which document an employee's immigration status, in a separate file as well. Keep an employee's workers' compensation file separate from their personnel file.

PART THREE: THINGS TO DO TO ONBOARD AMAZING EMPLOYEES

"Employers that are effectively linking their social missions to their employee's daily work are differentiating themselves in the market and generating big returns. Taking the necessary steps to ensure every employee knows how they fulfill the mission, achieve the vision, and execute one or more company strategies through his or her daily job really pays off."

- Tamar Elkeles, Ph.D. (Chief Talent Executive, Atlantic Bridge Capital, LLP, Former Chief Learning Officer, Qualcomm)

You might be wondering: Didn't we already do this? Can I just provide my new hire with an orientation and be done? Yes; but you'll be missing out on a big opportunity to create meaningful connections that affect their level of engagement and commitment to your organization.

ONBOARDING

Onboarding is the process of integrating your new employee into your company and can last up to one year. Part of the onboarding process includes regular check-in meetings to answer questions or clarify roles and responsibilities and to provide training on meeting job expectations and standards.

Onboarding is a deliberate effort to engage your new employees. And when employees are engaged, they are more likely to become loyal employees because they feel valued and understand how their jobs contribute to advancing your mission.

Onboarding is important because it's an opportunity to connect with your employees on an emotional level, capture their hearts, and make them feel like they are part of something meaningful. This is an opportunity for new hires to make connections with others and to expose them to your company's culture and values.

At your option, you may also use an onboarding software that reduces or eliminates paperwork to get your new hire up and running.

Now, let's look at the steps you can take to onboard amazing employees.

1. Get Buy-in

You *really* need buy-in from your CEO and executive staff if you want to put an effective onboarding plan into action.

- Get a commitment from key staff responsible for participating in the onboarding process.
 - Decide on how the CEO greets the new employee (in person, via email, pre-recorded message).
 - Decide on how the employee's supervisor interacts and greets the new employee on the first day and beyond.
 - Make sure the head of Operations is onboard to help with logistics and make sure support staff such as the parking attendant or receptionist are onboard with the process.
- **Timeframe:** Get this step done 2-4 weeks prior to creating your recruitment and onboarding plan.

2. Get Your Key Messages on Point

- As part of your buy-in efforts, make sure all staff reinforce your key messages (company mission, what it's like to work at your company, core company values, etc.) at every interaction they have with new employees (and customers and guests for that matter).
- Make sure your talking points are well developed and approved for use on the employee's first day. (Talking points are your notes and can be presented in a fancy powerpoint or basic notepad that you use to guide your orientation presentation).

3. Get Your Onboarding Plan Done

- The purpose of your onboarding plan is to measure your

employee's progress and assess their role and comfort level in your organization.

- Your onboarding plan is made up of two (2) parts and lasts for three (3) months. Part one is a **weekly** check-in meeting and part two is a **monthly** check-in meeting.
- Keep your plan simple and share it with key staff to foster buy-in, clarify roles, and make sure you provide the appropriate training and support as needed.
- Make sure the employee's supervisor is on board with the plan and have them include job-specific training and support during weekly check-in meetings.
- For your monthly meetings, we recommend that the employee's supervisor meet with the employee on day 30, 60 and 90 of their employment to see how they are fitting in. You'll need to ask specific questions and document these three one-on-one meetings (we'll discuss the use of a tool to help with this step, below).
- For your weekly meetings, we recommend that the supervisor use a checklist to document these meetings with the employee. These weekly meetings serve as training and learning opportunities for your employees.
- **Timeframe:** Get this step done 1-2 weeks prior to bringing your first employee onboard.

4. Weekly Meetings: Use a Checklist to Keep Things Moving

- We recommend the use of a document that serves as a checklist. The checklist allows you to track and check-off items on your onboarding list that you've completed when you interact with your new employee at the end of every week for the next 3 months. These are brief 30 minute meetings.
- The purpose of these weekly meetings is to encourage the employee to learn more about their job responsibilities, company culture, values, meet new people, attend training or meetings, "learn the ropes," etc.
- Include notes on feedback and goals in the checklist document.

- At the end of 3 months, the checklist and the monthly meeting documents go in the employee's personnel file. Refer to these documents as needed to evaluate the employee's performance.
- For an example, see Part Six, [Three-Month Onboarding Plan](#).

5. Monthly Meetings: Document Your 3 Check-in Meetings

- Now we turn to the practical use of tools to make things real (and document your process).
- Meet with your employee on **three** separate occasions on day 30, 60 and 90 of their employment. These meetings last about one hour or more.
- Develop questions to use at these meetings to help you assess how well your new employee is fitting in. Document their answers.
- Make sure you document each check-in meeting and follow-up with training and support as needed.
- For example of questions to use, see Part Six, [Sample Questions for Monthly Meetings](#).

PART FOUR: THINGS TO DO AFTER ONBOARDING - NOW WHAT?

“Everyone talks about building a relationship with your customer. I think you build one with your employees first.”

- Angela Ahrendts (Senior Vice President, Apple)

I bet you're wondering right now what else is there? Aren't I done? There's more beyond the onboarding process?

Yes. There's more. That's a good thing! Remember the *employee life cycle* we discussed in the Introduction? The *employee life cycle* describes the stages that an employee goes through at different points in your organization and the role you play at each stage.

You are now at a point of the *employee life cycle* that has to do with retaining and managing awesome people. A full discussion on employee management and retention activities is beyond the scope of this guide. But we do have some valuable pointers you can use to get you moving in the right direction.

1. Celebrate!

Pat yourself on the back! You've accomplished a major task. Now you have a blueprint on hand to use for the next time. Remember that it takes a lot of hard work and resources to hire the *right* person - and it's totally worth every effort!

2. What Happens if I Don't Hire the *Right* Person?

This tends to happen when we don't use best practices, “wing it,” or rush the process. Unfortunately, this is a costly mistake that leads to a lot of headaches. You'll spend a lot of time on performance management,

discipline and dealing with turnover and recruitment activities. It really pays off to dedicate enough time and resources on the hiring process to get it right, every time. One bonus of working with a recruiter is that they offer a guarantee period of somewhere between 3-6 months. Remember, practice makes perfect! And don't be afraid to ask for help.

3. Performance Management

This is a process by which you and your employees work together to plan, monitor and review how well they are meeting job expectations, objectives and making meaningful contributions to your company. It's a continuous process of planning, coaching and reviewing the performance of your employees. Reach out to us when you're ready to learn more and need help with creating a performance management process that meets your unique needs.

4. Pay Philosophy and Practice

A best practice is to have a pay philosophy that is fair and equitable, market-competitive and aligned to your business strategy. Spend some time on crafting your pay philosophy and practices so that you are able to attract and retain employees as well as be in compliance with equal pay laws.

Will you offer a bonus? If so, how will it be earned? Based on company performance? Personal? 50/50?

If you're offering equity compensation as part of the package, you should consult with your attorney and board to structure this.

5. Retention Plan

A robust retention plan keeps your staff motivated and engaged in your company, boosting productivity across the organization. An effective retention plan also attracts and retains your superstars, reduces turnover and related costs. [Contact](#) us for help in creating and implementing a retention plan that is right for you.

And now some fun compliance stuff you'll need to take care of!

6. Post Required Notices

Local, State and Federal agencies require you to post notices providing information on worker rights for your people. So check what is required for your state and industry in addition to meeting federal requirements.

7. File IRS Form 940 Each Year

If you are **not** using a payroll service provider to handle this step, then you'll need to do this step on your own. The IRS requires you to file Form 940 to report your federal unemployment tax for any year in which you paid wages of \$1,500 or more in any quarter or for any year in which an employee worked for you in any 20 or more different weeks of the year. To learn more, go to the [IRS Form 940](#) page.

You've made it this far! Now, let's keep going!

Thank you for taking the time to read Part One through Part Four. We hope you found the action steps useful. As you can see, the *employee life cycle* involves many levels and touch points. We encourage you to “touch” your employees at every level of the *employee life cycle*.

Your “touch” goes a long way to improve the employer-employee relationship.

Please read on. Part Five and Part Six of this guide offer valuable information on resources and tools you can use today.

PART FIVE: HIRING HR AND RECRUITMENT CONSULTANTS - WHO AND WHEN?

“Step through new doors. The majority of the time there's something fantastic on the other side.”

- Oprah Winfrey

You might be wondering: I'm feeling a bit overwhelmed. Can I get help from an expert to implement some of these steps? This is a natural feeling. Rest assured that we are here to help you decide on an approach that best meets your needs.

We understand that you are busy with important stuff like running your business. It's easier and more cost effective to use an outside professional to manage your human resources functions; especially if your business is not big enough to justify the cost of hiring a full-time HR manager or creating an HR department. It makes a lot of sense to get a consultant who has a broad and general knowledge on human resources management, and is ready to help you along the way.

Here are some questions to consider when you go out looking for an **HR consultant**.

- Does the consulting firm have the experience we're looking for?
- What are the industry-specific credentials that we should be looking for in a consultant?
- Do they have the knowledge, skills, and abilities required to successfully support our human resources needs?
- Can they deliver the results on time?
- How will the consultant assess my organization and human resources needs?
- Can I get references from past or current clients?

The *Right Fit* - Perhaps One of the *Most Important Things* to Consider is Whether or Not the Consultant *is the Right Fit* for You

- Can I see myself working in a true partnership with this consultant? Are they easy to work with?

Cue in the music... and with our best DJ voice... we say...

- And now a message from our sponsor, **be the change HR!**
- The **Pros** at **be the change HR** are knowledgeable, compassionate, and ready to be of service.
- [Contact](#) them today for a *free, fresh, friendly*, consultation.

For **Recruitment support**, you may look to outsource the process to a firm with expertise in your industry or the function you're looking to hire. Here are some good questions to ask when looking to hire a recruitment partner:

1. Does this firm have proven success in the CPG industry with similar roles?
2. Do I fully understand the fee structure and what happens if the candidate hired does not end up working out?
3. What does the search process look like, and are they able to give a solid estimated timeframe on delivery of Candidates?
4. WHO on the recruitment firms' team will be leading the interview process with candidates? Will it be someone different from my Client support contact? Many times, firms outsource sourcing and interviewing to a junior player on the team, someone different from the amazing sales person you originally met with.
5. How many searches does the firm take on at once? Will you be a priority or a number?
6. Does this recruitment partner seem invested in getting to know YOU, your business, your growth strategy, team and culture?
7. What will the cadence of check-ins be like?
8. What is the search firm committed to handling within the process and what will I handle (think...background checks, reference calls, writing job descriptions, offer letters, marketing the role...etc.)
9. How will this partner handle candidate rejections and will they leave candidates with an overall positive reflection of your company?
10. Do you like their overall vibe and ethos?

For hiring support within the natural CPG industry on roles within the Director through C-suite levels, **Orchid Holistic Search** is a boutique executive search firm with 14+ years expertise in the industry, across all functions. We are a small team invested in helping people-first businesses create excellence across the candidate process.

Learn more about us:

<https://orchidholisticsearch.com/companies>

PART SIX: TOOLS & TEMPLATES

"It's best to have your tools with you. If you don't, you're apt to find something you didn't expect and get discouraged."

- *Stephen King*

Please feel free to use and adapt these tools as you like. If you have any questions about this guide or these tools, please [contact](#) *be the change HR*.

To Your Success,

Your colleagues at *be the change HR* and *Orchid Holistic Search*.

Job Description Questionnaire

GENERAL PURPOSE OF THE JOB: Briefly describe the job's primary purpose or contribution to the department or the organization.

ESSENTIAL DUTIES AND RESPONSIBILITIES: List the job's essential or most important functions and responsibilities. Include all important aspects of the job -- whether performed daily, weekly, monthly, or annually; and any that occur at irregular intervals. Also list expected job outputs. (e.g., a receptionist's duties and responsibilities are to answer all incoming phone calls, take messages for the appropriate people, etc.)

ACCOUNTABILITY: Indicate the extent, if any, of the position's accountability for any of the following areas. (e.g., profits, sales, controls of cost, budgets, quality control, etc.)

SUPERVISORY RESPONSIBILITIES:

- Does this job have supervisory responsibilities? Yes No
- Are there subordinate supervisors reporting to this job? Yes No
- If yes, how many subordinate supervisors report to this job?
- What are the names of the departments supervised by this job?
- How many employees, in total, report to the subordinate supervisors?
- Are there non-supervisory employees who report directly to this job? Yes No
- If yes, how many employees are directly supervised by this job?

COMPETENCY CATEGORIES: Select the competencies and factors to add to the job description. Check only those competencies that apply to this job, and then select only those factors that apply to this competency within the job.

Intellectual

- Analytical**
 - Synthesizes complex or diverse information
 - Collects and researches data
 - Uses intuition and experience to complement data
 - Designs workflows and procedures

- Design**
 - Generates creative solutions
 - Translates concepts and information into images
 - Uses feedback to modify designs
 - Applies design principles
 - Demonstrates attention to detail
- Problem Solving**
 - Identifies and resolves problems in a timely manner
 - Gathers and analyzes information skillfully
 - Develops alternative solutions
 - Works well in group problem solving situations
 - Uses reason even when dealing with emotional topics
- Project Management**
 - Develops project plans
 - Coordinates projects
 - Communicates changes and progress
 - Completes projects on time and budget
 - Manages project team activities
- Technical Skills**
 - Assesses own strengths and weaknesses
 - Pursues training and development opportunities
 - Strives to continuously build knowledge and skills
 - Shares expertise with others

Interpersonal

- Customer Service**
 - Manages difficult or emotional customer situations
 - Responds promptly to customer needs
 - Solicits customer feedback to improve service
 - Responds to requests for service and assistance
 - Meets commitments
- Interpersonal Skills**
 - Focuses on solving conflict, not blaming
 - Maintains confidentiality
 - Listens to others without interrupting
 - Keeps emotions under control

- Remains open to others' ideas and tries new things
- Oral Communication**
 - Speaks clearly and persuasively in positive or negative situations.
 - Listens and gets clarification
 - Responds well to questions
 - Demonstrates group presentation skills
 - Participates in meetings
- Written Communication**
 - Writes clearly and informatively
 - Edits work for spelling and grammar
 - Varies writing style to meet needs
 - Presents numerical data effectively
 - Able to read and interpret written information
- Teamwork**
 - Balances team and individual responsibilities
 - Exhibits objectivity and openness to others' views
 - Gives and welcomes feedback
 - Contributes to building a positive team spirit
 - Puts success of team above own interests
 - Able to build morale and group commitments to goals and objectives
 - Supports everyone's efforts to succeed

Leadership

- Visionary Leadership**
 - Displays passion and optimism
 - Inspires respect and trust
 - Mobilizes others to fulfill the vision
 - Provides vision and inspiration to peers and subordinates
- Change Management**
 - Develops workable implementation plans
 - Communicates changes effectively
 - Builds commitment and overcomes resistance
 - Prepares and supports those affected by change
 - Monitors transition and evaluates results
- Delegation**

- Delegates work assignments
- Matches the responsibility to the person
- Gives authority to work independently
- Sets expectations and monitors delegated activities
- Provides recognition for results
- Leadership**
 - Exhibits confidence in self and others
 - Inspires and motivates others to perform well
 - Effectively influences actions and opinions of others
 - Accepts feedback from others
 - Gives appropriate recognition from others
- Managing People**
 - Includes staff in planning, decision-making, facilitating and process improvement
 - Takes responsibilities for subordinates' activities
 - Makes self available to staff
 - Provides regular performance feedback
 - Develops subordinates' skills and encourages growth
 - Solicits and applies customer feedback (internal and external)
 - Fosters quality focus in others
 - Improves processes, products and services
 - Continually works to improve supervisory skills
- Quality Management**
 - Looks for ways to improve and promote quality
 - Demonstrates accuracy and thoroughness

Organization

- Business Acumen**
 - Understands business implications of decisions
 - Displays orientation to profitability
 - Demonstrates knowledge of market and competition
 - Aligns work with strategic goals
- Cost Consciousness**
 - Works within approved budget
 - Develops and implements cost saving measures
 - Contributes to profits and revenue

- Conserves organizational resources

- Diversity**
 - Demonstrates knowledge of EEO policy
 - Shows respect and sensitivity for cultural differences
 - Educates others on the value of diversity
 - Promotes a harassment-free environment
 - Builds a diverse workforce

- Ethics**
 - Treats people with respect
 - Keeps commitments
 - Inspires the trust of others
 - Works with integrity and ethically
 - Upholds organizational values

- Organizational Support**
 - Follows policies and procedures
 - Completes administrative tasks correctly and on time
 - Supports organization's goals and values
 - Benefits organization through outside activities
 - Supports affirmative action and respects diversity

- Strategic Thinking**
 - Develops strategies to achieve organizational goals
 - Understands organization's strengths and weaknesses
 - Analyzes market and competition
 - Identifies external threats and opportunities
 - Adapts strategy to changing conditions

Self Management

- Judgment**
 - Displays willingness to make decisions
 - Exhibits sound and accurate judgment
 - Supports and explains reasoning for decisions
 - Includes appropriate people in decision-making process
 - Makes timely decisions

- Motivation**
 - Sets and achieves challenging goals
 - Demonstrates persistence and overcomes obstacles

- Measures self against standard of excellence
- Takes calculated risks to accomplish goals
- Planning/Organizing**
 - Prioritizes and plans work activities
 - Uses time efficiently
 - Plans for additional resources
 - Sets goals and objectives
 - Organizes or schedules other people and their tasks
 - Develops realistic action plans
- Professionalism**
 - Approaches others in a tactful manner
 - Reacts well under pressure
 - Treats others with respect and consideration regardless of their status or position
 - Accepts responsibility for own actions
 - Follows through on commitments
- Quality**
 - Demonstrates accuracy and thoroughness
 - Looks for ways to improve and promote quality
 - Applies feedback to improve performance
 - Monitors own work to ensure quality
- Quantity**
 - Meets productivity standards
 - Completes work in timely manner
 - Strives to increase productivity
 - Works quickly
- Safety and Security**
 - Observes safety and security procedures
 - Determines appropriate action beyond guidelines
 - Reports potentially unsafe conditions
 - Uses equipment and materials properly
- Adaptability**
 - Adapts to changes in the work environment
 - Manages competing demands
 - Changes approach or method to best fit the situation
 - Able to deal with frequent change, delays or unexpected events
- Attendance/Punctuality**

- Is consistently at work and on time
- Ensures work responsibilities are covered when absent
- Arrives at meetings and appointments on time
- Dependability**
 - Follows instructions, responds to management direction
 - Takes responsibility for own actions
 - Keeps commitments
 - Commits to long hours of work when necessary to reach goals
 - Completes tasks on time or notifies appropriate person with an alternate plan
- Initiative**
 - Volunteers readily
 - Undertakes self-development activities
 - Seeks increased responsibilities
 - Takes independent actions and calculated risks
 - Looks for and takes advantage of opportunities
 - Asks for and offers help when needed
- Innovation**
 - Displays original thinking and creativity
 - Meets challenges with resourcefulness
 - Generates suggestions for improving work
 - Develops innovative approaches and ideas
 - Presents ideas and information in a manner that gets others' attention

BUSINESS RELATED CONTACTS: List the names and titles of the departments, agencies, or organizations with which the position would normally have contact with in the performance of its duties. State the reason and frequency of the contacts. Do not include the position's supervisor, subordinates, or other in the same department or group.

EDUCATION AND/OR EXPERIENCE: Select the level of education and/or experience needed to successfully accomplish the essential duties of this job.

- Level 1:** No prior experience or training.
- Level 2:** Less than high school education; or up to one month related experience or training; or equivalent combination of education and experience.
- Level 3:** High school diploma or general education degree (GED); or one to three months related experience and/or training; or equivalent combination of education and experience.

- Level 4:** One year certificate from college or technical school; or three to six months related experience and/or training; or equivalent combination of education and experience.
- Level 5:** Associate's degree (A. A.) or equivalent from two-year college or technical school; or six months to one year related experience and/or training; or equivalent combination of education and experience.
- Level 6:** Bachelor's degree (B. A.) from four-year college or university; or one to two years related experience and/or training; or equivalent combination of education and experience.
- Level 7:** Fifth year college or university program certificate; or two to four years related experience and/or training; or equivalent combination of education and experience.
- Level 8:** Master's degree (M. A.) or equivalent; or four to ten years related experience and/or training; or equivalent combination of education and experience.
- Level 9:** Doctoral degree (Ph. D.) or equivalent; or more than 10 years related experience and/or training; or equivalent combination of education and experience.

LANGUAGE SKILLS: Select the level of language (ability to read, write, and speak needed to successfully accomplish the essential duties of this job.)

- Level 1:** Ability to read a limited number of two- and three-syllable words and to recognize similarities and differences between words and between series of numbers. Ability to print and speak simple sentences.
- Level 2:** Ability to read and comprehend simple instructions, short correspondence, and memos. Ability to write simple correspondence. Ability to effectively present information in one-on-one and small group situations to customers, clients, and other employees of the organization.
- Level 3:** Ability to read and interpret documents such as safety rules, operating and maintenance instructions, and procedure manuals. Ability to write routine reports and correspondence. Ability to speak effectively before groups of customers or employees of the organization.
- Level 4:** Ability to read, analyze, and interpret general business periodicals, professional journals, technical procedures, or governmental regulations. Ability to write reports, business correspondence, and procedure manuals. Ability to effectively present information and respond to questions from groups of managers, clients, customers, and the general public.
- Level 5:** Ability to read, analyze, and interpret common scientific and technical journals, financial reports, and legal documents. Ability to respond to common inquiries or complaints from customers, regulatory agencies, or members of the business community. Ability to write speeches and articles for publication that conform to prescribed style and format. Ability to effectively present information to top management, public groups, and/or boards of directors.

- Level 6:** Ability to read, analyze, and interpret the most complex documents. Ability to respond effectively to the most sensitive inquiries or complaints. Ability to write speeches and articles using original or innovative techniques or style. Ability to make effective and persuasive speeches and presentations on controversial or complex topics to top management, public groups, and/or boards of directors.

MATHEMATICAL SKILLS: Select the level of mathematical skills and ability needed to successfully accomplish the essential duties of this job.

- Level 1:** Minimum Skills: Ability to add and subtract two digit numbers and to multiply and divide with 10's and 100's. Ability to perform these operations using units of American money and weight measurement, volume, and distance.
- Level 2:** Basic Skills: Ability to add, subtract, multiply, and divide in all units of measure, using whole numbers, common fractions, and decimals. Ability to compute rate, ratio, and percent and to draw and interpret bar graphs.
- Level 3:** Intermediate Skills: Ability to calculate figures and amounts such as discounts, interest, commissions, proportions, percentages, area, circumference, and volume. Ability to apply concepts of basic algebra and geometry.
- Level 4:** High Skills: Ability to work with mathematical concepts such as probability and statistical inference, and fundamentals of plane and solid geometry and trigonometry. Ability to apply concepts such as fractions, percentages, ratios, and proportions to practical situations.
- Level 5:** Very High Skills: Ability to apply advanced mathematical concepts such as exponents, logarithms, quadratic equations, and permutations. Ability to apply mathematical operations to such tasks as frequency distribution, determination of test reliability and validity, analysis of variance, correlation techniques, sampling theory, and factor analysis.
- Level 6:** Highest Skills: Ability to comprehend and apply principles of advanced calculus, modern algebra, and advanced statistical theory. Ability to work with concepts such as limits, rings, quadratic and differential equations, and proofs of theorems.

REASONING ABILITY: Select the level of reasoning skills and abilities needed to successfully accomplish the essential duties of this job.

- Level 1:** Minimum Skills: Ability to apply common sense understanding to carry out simple one- or two-step instructions. Ability to deal with standardized situations with only occasional or no variables.
- Level 2:** Basic Skills: Ability to apply common sense understanding to carry out detailed but uninvolved written or oral instructions. Ability to deal with problems involving a few concrete variables in standardized situations.

- Level 3:** Intermediate Skills: Ability to apply common sense understanding to carry out instructions furnished in written, oral, or diagram form. Ability to deal with problems involving several concrete variables in standardized situations.
- Level 4:** High Skills: Ability to solve practical problems and deal with a variety of concrete variables in situations where only limited standardization exists. Ability to interpret a variety of instructions furnished in written, oral, diagram, or schedule form.
- Level 5:** Very High Skills: Ability to define problems, collect data, establish facts, and draw valid conclusions. Ability to interpret an extensive variety of technical instructions in mathematical or diagram form and deal with several abstract and concrete variables.
- Level 6:** Highest Skills: Ability to apply principles of logical or scientific thinking to a wide range of intellectual and practical problems. Ability to deal with nonverbal symbolism (formulas, scientific equations, graphs, musical notes, etc.) in its most difficult phases. Ability to deal with a variety of abstract and concrete variables.

COMPUTER SKILLS:

- | | |
|---|--|
| <input type="checkbox"/> Accounting Software | <input type="checkbox"/> Contract Management Systems |
| <input type="checkbox"/> Database Software | <input type="checkbox"/> Design Software |
| <input type="checkbox"/> Development Software | <input type="checkbox"/> Human Resource Systems |
| <input type="checkbox"/> Internet Software | <input type="checkbox"/> Inventory Software |
| <input type="checkbox"/> Manufacturing Software | <input type="checkbox"/> Order Processing Systems |
| <input type="checkbox"/> Payroll Systems | <input type="checkbox"/> Project Management Software |
| <input type="checkbox"/> Spreadsheet Software | <input type="checkbox"/> Word Processing Software |
| <input type="checkbox"/> Other: _____ | |

CERTIFICATES, LICENSES, REGISTRATIONS: List the licenses, certificates, and registrations that are required to perform the essential duties of this job.

OTHER SKILLS AND ABILITIES:

OTHER QUALIFICATIONS:

LIST SPECIALIZED EQUIPMENT, MACHINES, OR VEHICLES NORMALLY USED IN THE COURSE OF THE DUTIES OF THE POSITION. Explain the type of equipment, purpose, and approximate amount of time used. (DO NOT include common office machines such as computers, desk calculators, adding machines, telephones, copy or fax machines.)

QUESTIONNAIRE PREPARED BY:

Name:

Date:

Title:

Basis for knowledge of job:

- Hold job now
- Supervise job
- Other, explain:

The statements herein are intended to describe the general nature and level of work being performed by employees, and are not to be construed as an exhaustive list of responsibilities, duties, and skills required of personnel so classified. Furthermore, they do not establish a contract for employment and are subject to change at the discretion of the employer.

Hiring an Independent Contractor

When hiring someone as an independent contractor, it's important to figure out if they're truly independent or should be classified as an employee. Misclassifying can result in fines.

To assess this, consider the "[economic reality test](#)" which looks at control, independence, and financial risk.

Here are some questions to consider when trying to determine whether you hire (and subsequently classify) an independent contractor:

- Does the company control how and what the worker does?
- Who handles expenses, tools, and payment methods?
- Are there written contracts, benefits, or long-term commitments?

If you find that the worker has more control over their work and expenses, and if there are no long-term commitments, they may be more likely to be considered an independent contractor.

In this case, remember to:

- Keep records of your decision and why you made it.
- If you're unsure, it's wise to get professional legal advice.
- And some states may have stricter legal requirements so check your state.

If you're still uncertain about the worker's status, seeking professional advice is always a good idea.

For additional assistance:

- Visit the [IRS self-employed individuals tax center](#).
- Use [Form SS-8](#) to determine worker status with the IRS.
- Refer to [Publication 1976](#) for employment tax relief requirements.
- Use [Form 8919](#) to report uncollected Social Security and Medicare taxes for misclassified workers.

Sample Job Description

Before I start editing away here - normally we advise companies to put a company summary as a way to sell the opportunity. Thoughts?

[Please Note: Use the information you gathered in the *Job Description Questionnaire* to develop your Job Description. You'll use your completed job description to create a job announcement that effectively markets your open job opportunity.

The following is an example of what a typical job description looks like. Please feel free to use and expand on it. Create a process for regularly updating your official job descriptions and keep a current copy of the job description in personnel files.]

The XYZ Company

ABC Technician

Job Description

Job Title:

Work Location: Address / physical location

Division/Department: Operations, etc

Reports to: Title of Manager (not person's name)

Full-time

Part-time

Temporary

Seasonal

FLSA: **Exempt**

FLSA: **Nonexempt**

Summary [this is the general purpose of the job]:

Essential Duties and Responsibilities:

[Jobs requiring Punctuality and Attendance, include the following statement (do not remove)]:
 Strict attendance and punctuality is required to perform duties and responsibilities at the work location. Attendance is necessary for teamwork, face-to-face interaction with clients, and working with items or equipment located in the employer's place of business.

[For Management-Level Exempt Positions (remove this paragraph if not a management position - (this is an example only)]: The primary duty of the manager is to manage the function(s) of (i.e., annual giving program, recruitment and selection, building support, membership program, professional development, etc.) and/or department by customarily and regularly directing the

work of at least two or more full-time employees or their equivalent, and having the authority to hire or fire other employees, or giving suggestions and recommendations as to the hiring, firing, advancement, promotion or any other change of status of other employees.

[Then add bullet points, listing the specific tasks and job duties of the position that are required on a daily basis. Items should begin with action words such as performs, responsible for, delivers, develops, advises, etc. If this position is part of a group of levels (i.e. Customer Service Rep I - Customer Service Rep II), be sure to show the increase in responsibility or progress required to advance to different levels.]

[Examples:]

- Perform related duties as assigned by the supervisor.
- Maintain compliance with all company policies and procedures.

Accountability [list the results or functions that this position is accountable for]:

Supervisory Responsibilities [list any supervisory responsibilities her]:

Competency Categories [list the competencies, such as Intellectual, Interpersonal, Teamwork, Leadership, that are required to successfully perform this job]:

Business Related Contacts [list any contacts that this position is required to interact with on a regular basis]:

Knowledge, Skills, and Abilities [list the core skills required to fulfill the essential job functions of this position]:

Education and Work Experience Requirements [list the education and experience required here]:

[Examples:]

Education, certification or licensing requirements:

- High school diploma or GED.
- Bachelor's degree in...

Work experience must demonstrate the following knowledge, skills and abilities:

- Excellent verbal and written communication skills, including ability to effectively communicate with internal and external customers.
- Excellent computer proficiency (MS Office – Word, Excel and Outlook).
- Must be able to work under pressure and meet deadlines, while maintaining a positive attitude and providing exemplary customer service.
- Ability to work independently and to carry out assignments to completion within parameters of instructions given, prescribed routines, and standard accepted practices.

Management experience must demonstrate the following knowledge, skills and abilities:

- Understanding team dynamics and encouraging good relationships.
- Selecting and developing the right people.
- Delegating effectively.
- Motivating people.
- Managing discipline and dealing with conflict.
- Communicating.
- Planning, making decisions, and problem solving.
- Leadership and interpersonal (people) skills.

Preferred Education and Work Experience:

- Associates Degree, etc.

Physical Requirements:

[What is physically required to perform the daily tasks and job duties? Be specific. Some **examples** are:]

- Must be able to lift and carry up to 50 lbs.
- Must be able to talk, listen and speak clearly on the telephone.
- [Include (do not remove):] Ability to safely and successfully perform the essential job functions consistent with the ADA, FMLA and other federal, state and local standards, including meeting standards specified in job description and through performance management.
- [Include (do not remove):] Ability to maintain regular, punctual attendance consistent with the ADA, FMLA and other federal, state and local standards.
- [Include if the nature of the job requires it (do not remove):] Must be able to be physically present at work during operating hours.

Date of last revision for this Job Description:

Employee's Signature:

Today's Date:

Sample Interview Questions

Best Interview Questions

- 1) What do you know about the company?
- 2) What are your goals for the future?
- 3) What One Skill Makes You the Most Qualified for This Position?
- 4) Can You Tell Me About a Time When You Overcame a Challenge?
- 5) What Three Words Would You Use to Describe Your Ideal Work Environment?
- 6) What One Skill Would You Like to Improve and What's Your Plan for Doing So?
- 7) What is your greatest professional achievement?
- 8) What are your greatest professional strengths?
- 9) What do you consider to be your weaknesses?

Worst Interview Questions. DO NOT ASK THESE.

- 1) Will you need personal time off for particular religious holidays?
- 2) How long do you plan to work until you retire?
- 3) Have you experienced any serious illnesses in the past year?
- 4) Are You Married?
- 5) What arrangements are you able to make for child care while you work?
- 6) Have You Ever Been Arrested?
- 7) What Is Your Nationality?
- 8) Do you have any outstanding debt?
- 9) What type of discharge did you receive in the military?
- 10) What is your sexual orientation?

Interview Guide

Date	Date of interview.
Position	Title of position applicant is interviewing for.
Candidate Name	Applicant's Name
HR Representative	Name of HR representative conducting the interview.

1. Review position requirements
2. Have candidate complete the Availability Form

Scoring: Use the rating system below to score the candidate's responses to each question. Document the response and make any comments in the space provided. The numerical rating system is as follows:

Rating	Introduction	Appearance	Communication	Preparation	Skills Required
(4) Exceeds Expectations	Greeting is present. Use of eye contact is appropriate. Pleasant manners.	Appropriately dressed, clean, pleasant smell, comfortable in attire.	Appropriate body language. Good volume, grammar and vocabulary used. Spoken with a determined confidence.	Was knowledgeable about the company. Aligned answers with the needs of the company and the position. Demonstrated skills and qualifications in their answers.	Superior skills; could mentor or teach others in this.
(3) Meets Expectations	Greeting is present. Use of eye contact is appropriate. Uses manners.	Appropriately dressed	Little inappropriate body language. Good volume, grammar and vocabulary used. Slightly nervous.	Demonstrated research. Answered questions in full with relevant responses. Demonstrated knowledge of needs and gave examples that aligned. Provided professional reference to	Adequate skills; no additional training is needed at this time.

				samples of their work.	
(2) Below Expectations	Greeting is present. Begins with little or no eye contact.	Wears some inappropriate clothing	Some inappropriate body language. Speech is too soft or mumbles. Poor grammar is used. Very nervous.	Knew some basics. Moderately demonstrated their skills and qualifications. Provided few examples of background that align with the needs of the position. Provided a portfolio, but did not present it professionally.	Some training would be required to bring skills up to an acceptable standard.
(1) Does Not Meet Expectations	Greeting absent. Begins with little or no eye contact.	Not dressed appropriately	Inappropriate body language. Inappropriate vocabulary and grammar are used. Speech is difficult to understand.	Knew very little or nothing. Answered questions briefly, did not give examples or specific details. No connection between answers and the needs of the position.	Not competent in this area; needs substantial development.

Questions about Skills and Personality Traits:

Describe how you would assist the XYZ Company in fulfilling its mission.
Response:
Comments:

Rating: (circle one)	(1) Does not meet Expectations	(2) Below Expectations	(3) Meets Expectations	(4) Exceeds Expectations
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<p>What are two of your best personality traits that you use to build professional, positive relationships with people?</p> <p>What is one trait you consider to be an “opportunity” or a trait you can improve on?</p>				
<p>Response:</p>				
<p>Comments:</p>				
Rating: (circle one)	(1) Does not meet Expectations	(2) Below Expectations	(3) Meets Expectations	(4) Exceeds Expectations

Behavioral Questions

*(Note to the interviewers – the next set of questions are **behavioral questions**. Encourage the candidate to give examples that describe the situation, the action they took to remedy the situation and the result. Their answer should illustrate/demonstrate the behavior you are seeking as part of the selection criteria.)*

<p>Selection criteria: how do they handle stressful situations.</p>
<p>Tell me about a time you overcame a stressful challenge at work?</p>

Situation:		Action:		Result:
Comments:				
Rating: (circle one)	(1) Does not meet Expectations	(2) Below Expectations	(3) Meets Expectations	(4) Exceeds Expectations

Selection criteria: how do they motivate team members.		
Give me an example of a time when you motivated others.		
Situation:	Action:	Result:
Comments:		

Rating: (circle one)	(1) Does not meet Expectations	(2) Below Expectations	(3) Meets Expectations	(4) Exceeds Expectations
Selection criteria: Teamwork.				
Tell me about a time that you were part of a team and worked on a successful project? What role did you play?				
Response:				
Comments:				
Rating: (circle one)	(1) Does not meet Expectations	(2) Below Expectations	(3) Meets Expectations	(4) Exceeds Expectations

Selection criteria: customer service.				
Tell us about a proud moment at work when you delighted a customer.				
Response:				
Comments:				
Rating: (circle one)	(1) Does not meet Expectations	(2) Below Expectations	(3) Meets Expectations	(4) Exceeds Expectations

Selection criteria: what is their preference for working (independent, team, organized)				
How would you describe your working style?				
Response:				
Comments:				
Rating: (circle one)	(1) Does not meet Expectations	(2) Below Expectations	(3) Meets Expectations	(4) Exceeds Expectations

Selection criteria: Integrity		
Tell me about a mistake you made in a past job that you regretted. What happened and what did you learn from it?		
Situation:	Action:	Result:
Comments:		

Rating: (circle one)	(1) Does not meet Expectations	(2) Below Expectations	(3) Meets Expectations	(4) Exceeds Expectations
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Selection criteria: working with others / teamwork				
Tell me about a time when you and a co-worker did not get along. How did you resolve this situation?				
Response:				
Comments:				
Rating: (circle one)	(1) Does not meet Expectations	(2) Below Expectations	(3) Meets Expectations	(4) Exceeds Expectations

Interview Close

- Ask the candidate if he or she has any questions and provide responses to these.
- Highlight the positive aspects of working within the XYZ Company including the:
 - Benefits (mission-driven, great people to work with, relaxed and supportive culture)
 - Location (Near shopping, parking, easy access to metro)
- Describe the next steps in the selection process (e.g., interview with the hiring manager if selected) and provide a clear timeframe for when the candidate will hear the outcome of his or her application.
- Thank the candidate for his or her application and time.

Overall Comments:

Does this candidate meet expectations and did they score a 3 or higher on all or most questions?

Overall Score: _____

- Yes, recommended for next step NO, not recommended for next step

Signature of Human Resources Representative:

Application for Employment

Please provide complete and legible information. An incomplete application may affect your consideration for employment. If necessary, attach a separate sheet for additional information.

(THE COMPANY) is committed to a policy of Equal Employment Opportunity and will not discriminate against an applicant or employee on the basis of on actual or perceived race, religious creed, color, national origin, citizenship status, ancestry, physical or mental disability, AIDS/HIV, medical condition (specifically cancer-related conditions and genetic characteristics), marital status, sex (including pregnancy, childbirth or related medical conditions, a person's gender, breastfeeding and medical conditions related to breastfeeding), age (40 years and older), political activities or affiliations, status as a victim of domestic violence, assault or stalking, genetic information, sexual orientation, gender identity or expression and any other status protected by law. The information collected by this application is solely to determine suitability for employment, verify identity, and maintain employment statistics on applicants.

Applicants with disabilities may be entitled to reasonable accommodation under the Americans with Disabilities Act and certain state or local laws. A reasonable accommodation is a change in the way things are normally done which will ensure an equal employment opportunity without imposing undue hardship on (THE COMPANY). Please inform the company's personnel representative if you need assistance completing this application or to otherwise participate in the application process.

Your application will be active for 90 days. If you are not hired during that time period, but wish to continue to be considered for available positions, you must complete a new application.

General Information

Full Name			
_____	_____	_____	_____ FIRST
MIDDLE	LAST	DATE	
Address _____			

STREET	CITY	STATE	ZIP CODE
Contact Number (____) _____ Date available for work _____			

Alternate Contact Number (____) _____ Email (optional) _____

Are you legally authorized to work in the United States? Yes No

Do you now, or will you in the future, require immigration sponsorship for work authorization (e.g., H-1B)? Yes No
(If hired, verification will be required consistent with federal law.)

Are you at least 18 years old? Yes No
(If no, you may be required to provide authorization to work.)

Do you have a driver's license? Yes No Operator Commercial (CDL)

Driver's license number _____ State of issue _____ Expiration date:

How did you learn about [the position/(THE COMPANY)]? _____

Position Information

Position applied for: _____

Applying for: Full-time Part-time Seasonal/Temporary

Education

Type of School	School Name and Location	Number of Years Completed	Diploma, Degree, or Certificate Received	Course of Study or Major
High School (or G.E.D. equivalent)				
College or University				
Graduate School				
Vocational or Trade School				

Other				
-------	--	--	--	--

Background Information

During the past seven years, have you ever been discharged, suspended, or asked to resign from any position?

Yes No If yes, please explain. _____

For the purpose of verifying information on this application, have you ever worked or attended school under a different name at any of the organizations you have listed?

Yes No If yes, specify name. __

Person/Professional References

List three personal/professional references (other than those listed as a current/former supervisor) that we may contact:

Name _____ Telephone No. (____) _____

Email Address _____ Type of Acquaintance ____

Name _____ Telephone No. (____)

Email Address _____ Type of Acquaintance ____

Name _____ Telephone No. (____)

Email Address _____	_____

	Type of Acquaintance _____

Employment Record

List all employment experience for the past seven years, starting with the most recent or present employer, including US military service or training. Using a separate section for each position, describe in detail all work experience. **You may include as part of your employment history any verifiable work performed on a volunteer basis. Resumes may not be substituted in lieu of completing the following employment information.**

Current Employer _____ _____ Geographic Location _____ _____ Your Position _____ _____ Supervisor's Name/Title _____ _____ May we contact? <input type="checkbox"/> Yes <input type="checkbox"/> No If not, why? _____ _____ Primary responsibilities _____ _____ _____ _____	Phone (____) _____ _____ From _____ _____ Month Year To _____ _____ Month Year Reason for Leaving (for military service, include only your rank at time of discharge) _____ _____ _____ _____
Employer _____ _____ Geographic Location _____ _____ Your Position _____ _____ Supervisor's Name/Title _____ _____ Primary responsibilities _____ _____	Phone (____) _____ _____ From _____ _____ Month Year To _____ _____ Month Year Reason for Leaving (for military service, include only your rank at

	time of discharge) _____ _____
Employer _____ _____	Phone (____) _____ _____
Geographic Location _____ _____	From _____ _____ Month Year
Your Position _____ _____	To _____ _____ Month Year
Supervisor's Name/Title _____ _____	Reason for Leaving (for military service, include only your rank at time of discharge) _____ _____
Primary responsibilities _____ _____ _____	
Employer _____ _____	Phone (____) _____ _____
Geographic Location _____ _____	From _____ _____ Month Year
Your Position _____ _____	To _____ _____ Month Year
Supervisor's Name/Title _____ _____	Reason for Leaving (for military service, include only rank at time of discharge) _____ _____
Primary responsibilities _____ _____ _____	

Have you worked for (THE COMPANY) before?

Yes No If yes, at what location? _____ Job title: _____

Relatives of current employees of (THE COMPANY) will not be hired if they would be working for, or directly supervising, a current employee/cannot work together in the same department or on the same team as a current employee. If you receive a conditional offer of employment, you may be asked to identify any relative who is a current employee of (THE COMPANY). For purposes of this policy, "relative" is defined as any person who is related by blood or marriage, or whose relationship with the employee is similar to that of people who are related by blood or marriage.

Have you signed or otherwise agreed to any non-solicitation, non-competition, or other similar post-employment restriction or agreement with your current or any prior employer?

Yes No If yes, explain:

Other Work-Related Skills or Experience

Please list any other skills or additional training you have that relate to the position for which you are applying. For example, list any special coursework, fluency in another language, licenses, certificates, or special training.

**PLEASE READ CAREFULLY AND INITIAL EACH PARAGRAPH BEFORE
SIGNING**

I understand, where permissible under applicable federal, state, or local law, I may be subject to a pre-employment drug test after receiving a conditional offer of employment and must receive a negative result for illegal drug use before being permitted to commence work with (THE COMPANY).

_____ Initials

I understand, where permissible under applicable federal, state, or local law, I may be subject to a pre-employment medical examination after receiving a conditional offer of employment and must meet the qualifications for the position, with or without reasonable accommodation, before being permitted to commence work with (THE COMPANY).

_____ Initials

I understand, where permissible under applicable federal, state, or local law, I may be subject to a pre-employment background check after receiving a conditional offer of employment to investigate my criminal background, driving record, credit history and other matters related to my suitability for employment. I understand that a separate disclosure and consent form will be provided to me prior to any background check.

_____ Initials

I understand employment with (THE COMPANY) is also contingent on my providing sufficient documentation necessary to establish my identity and eligibility to work in the United States.

_____ Initials

I authorize (THE COMPANY) and its representatives to contact my current and former employers (with the exception of my current employer, if I have marked "May we contact?" on page [3/PAGE NUMBER] of this application as "No"), schools, references, and other persons or organizations I have named in this application for the purpose of verifying the information I have provided. I release my current and former employers, schools, references, and other persons or organizations named in this application from any liability resulting from the information released. I authorize employers, schools, and other persons or organizations named in this application to provide any information or transcripts requested.

_____ Initials

I hereby certify that, if employed, my employment with (THE COMPANY) will not conflict with, violate, breach, or result in default under, any contract, agreement, or understanding that I am a party to or am bound by, including any non-solicitation, non-competition, or other similar post-employment restriction or agreement I have with any current or former employer, other than the contracts, agreements, covenants, or understandings I have disclosed in this application, if any.

_____ Initials

I understand and agree that, if hired, my employment will be at will, which means employment is for an indefinite period of time and may be terminated by myself or (THE COMPANY) at any time, with or without cause, and with or without notice.

_____ Initials

I certify that all of the above information is true and complete and I understand that any falsification or omission of information made by me may disqualify me from further consideration for employment or, if hired, may result in my termination at any time during the period of my employment, regardless of the amount of time that has passed.

_____ Initials

Note: An offer of employment is conditioned upon complying with (THE COMPANY)'s requirements including, but not limited to, signing a separate disclosure and consent form prior to any background check.

MY SIGNATURE IS EVIDENCE THAT I HAVE READ AND AGREE WITH THE ABOVE STATEMENTS.

Applicant's signature: _____ Date: _____

Sample Offer Letter Template

[On Letterhead]

[ADDRESSEE]

[ADDRESS LINE 1]

[ADDRESS LINE 2]

[CITY, STATE AND ZIP CODE]

[DATE]

Dear [NAME],

We are very pleased to offer you a position with [EMPLOYER NAME]. This offer of at-will employment is conditioned on your satisfactory completion of certain requirements, as explained in this letter. Your employment is subject to the terms and conditions set forth in this letter, which override anything said to you during your interview or any other discussions about your employment with [EMPLOYER NAME]. Your employment will be subject to your satisfactory completion of a 90-day probationary period. However, completion of the probation period will not alter your at-will employment status in any way.

You will be hired as a [full-time/part-time] [POSITION] [working [NUMBER] days a week, specifically ([DAYS OF THE WEEK OR WORKWEEK])] effective [DATE], your start date. This is [an exempt/a nonexempt] position. In your capacity as [POSITION], you will [perform duties and responsibilities that are reasonable and consistent with such position as may be assigned to you from time to time/be responsible for [DUTIES]]. You will report directly to [POSITION], currently [NAME], or another individual designated by [EMPLOYER NAME]'s [POSITION]. You agree to devote your full business time, attention, and best effort to the performance of your duties and to the furtherance of [EMPLOYER NAME]'s interests.

In consideration of your services, you will be paid [a salary of \$[AMOUNT] per year/on an hourly basis at the rate of \$[AMOUNT] per hour][, plus all applicable overtime as required by law], payable [FREQUENCY OF PAY] in accordance with

the standard payroll practices of [EMPLOYER NAME] and subject to all withholdings and deductions as required by law.

If this offer is accepted and you begin employment with [EMPLOYER NAME], you will be eligible to participate in any benefit plans and programs in effect from time to time, including [vacation/Paid Time Off (PTO)], [group medical and life insurance,] [disability benefits,] [OTHER BENEFITS], and other fringe benefits as are made available to other similarly situated employees of [EMPLOYER NAME], in accordance with and subject to the eligibility and other provisions of such plans and programs.

You will be subject to all applicable employment and other policies of [EMPLOYER NAME], as outlined in the Employee Handbook and elsewhere.

Your employment will be at-will, meaning that you or [EMPLOYER NAME] may terminate the employment relationship at any time, with or without cause, and with or without notice.

This offer is contingent upon:

- Verification of your right to work in the United States, as demonstrated by your completion of the I-9 form upon hire and your submission of acceptable documentation (as noted on the I-9 form) verifying your identity and work authorization within three days of starting employment. For your convenience, a copy of the I-9 Form's List of Acceptable Documents is enclosed for your review.
- [[EMPLOYER NAME] receiving [NUMBER] references [from former employers] [(one of which must be from your current employer)] that it considers satisfactory. Please provide [NAME/DEPARTMENT AND CONTACT INFORMATION] the names and contact details of your references as soon as possible, if you have not already done so.]
- [Satisfactory completion of a background investigation, for which the required notice and consent forms are enclosed with this letter.]
- [Your execution of [EMPLOYER NAME]'s enclosed [LIST OTHER AGREEMENT(S) TO BE EXECUTED BEFORE COMMENCING WORK].]

- [A medical report that [EMPLOYER NAME] considers satisfactory, from a doctor chosen (and paid for) by [EMPLOYER NAME]/[EMPLOYER NAME] or its insurers being satisfied with your responses to the medical questionnaire, which will be sent to you after you accept this offer.]
- [[EMPLOYER NAME] receiving verification that you hold the following qualification(s): [LIST QUALIFICATIONS AND MEANS OF VERIFICATION].]
- [Your passing the following examination(s) [on the [first/second] attempt]: [EXAMINATIONS].]

This offer will be withdrawn if any of the above conditions are not satisfied. [Please do not resign from your current job until you have confirmation from [EMPLOYER NAME] that these conditions have been satisfied.]

By accepting this offer, you confirm that you are able to accept this job and carry out the work involved without breaching any legal restrictions on your activities, such as restrictions imposed by a current or former employer. You also confirm that you will inform [EMPLOYER NAME] about any such restrictions and provide [EMPLOYER NAME] with as much information about them as possible, including any agreements between you and your current or former employer describing such restrictions on your activities.

You further confirm that you will not remove or take any documents or proprietary data or materials of any kind, electronic or otherwise, with you from your current or former employer to [EMPLOYER NAME] without written authorization from your current or former employer, nor will you use or disclose any such confidential information during the course and scope of your employment with [EMPLOYER NAME]. If you have any questions about the ownership of particular documents or other information, discuss such questions with your former employer before removing or copying the documents or information.

All of us at [EMPLOYER NAME] are excited at the prospect of you joining our team. If you have any questions about the above details, please call me immediately. If you wish to accept this position, please sign below and return this

letter agreement to [me/[POSITION]] within [NUMBER] days. This offer is open for you to accept until [DATE], at which time it will be deemed to be withdrawn.

I look forward to hearing from you.

Yours sincerely,

[NAME]

[TITLE]

On behalf of [EMPLOYER NAME]

[NAME OF APPLICANT]

Signed

Date

New Hire Checklist

(this is a basic list, feel free to add to it)

New Hire Forms (to be completed for the personnel file):

- Application
- Offer Letter
- I-9
- Copies of I-9 Supporting Documents
- W-4
- State Withholding Allowance Certificate (if applicable)
- Acknowledgment of Handouts (typically a form that states the employee acknowledges completing and receiving required forms and notices)

New Hire Forms (to give to employees): Your state may have specific forms you must hand out on the employee's first day. Such forms may be related to the state's anti-harassment laws, workers' compensation notices, protected leaves of absences, etc. So check with your state or local government to ensure compliance. Your final form may include the "Acknowledgment of Handouts" that has a list of all the forms and notices you provided your newly hired employee - yay!

Sample Questions for Monthly Meetings

(use this tool to present your questions and document your meetings)

Questions for Your Day 30th Meeting:

1. How are you doing? Tell me what it's been like working here.
 - o [Add a space on this document to record the employee's answers to the questions and add a space to capture your notes or any follow-up items you'll need to address. See the next 2 bullet points as examples]
 - o Answer:
 - o Follow-up action (notes):
2. What's been the most interesting part of your job?
3. How are you getting along with your teammates?
4. What do you think about our company's mission/values?
5. What can we do to continue supporting you?
6. Looking back at your orientation, is there anything we could have done differently to prepare you for your role?
7. Do you have any questions? Do you have any suggestions for improving the way we work together?

Questions for Your Day 60th Meeting:

1. How are you feeling about being part of our team?
2. How are you managing your workload?
3. Do you feel that you have enough support or the tools to do your job?
4. What about training – do you think you have been adequately trained to do your job?
5. What parts of your job are most challenging or difficult?
6. What part of your job do you enjoy the most?
7. How do you see your job relating to our mission?
8. How well do you think you are meeting your job expectations?
9. Is there anything that is not clear?
10. What kind of relationship do you have with your coworkers?
11. Now that it's been 2 months, did you ever imagine that it would turn out this way?
12. Looking at the next 30 days after today, what do you think is the number one thing you need to be successful at your job?

13. What might be some concerns or questions you have?
14. Do you have any questions about what to expect in the next 30 days?

Questions for Your Day 90th Meeting:

1. Now that you've had some time to build some relationships with co-workers, how has that helped?
2. What part of the mentoring program for new employees do you like most/least?
3. What are some things that your co-workers do that you find particularly helpful?
4. Getting along with your co-workers is important to us – have you experienced any issues in this area?
5. Have you experienced any conflict with co-workers – if so, how have you handled it? Is the conflict resolved? Did you bring this up to your supervisor?
6. Have you experienced any inappropriate behavior?
7. How comfortable do you feel telling your supervisor that you're having trouble with a particular co-worker? Or that you're having a challenging time getting along with a particular person/customer?
8. How do you feel about participating in company-sponsored social events? Do you find value in these types of events?
9. How up to speed are you with your training?
10. Have you thought about taking additional training we offer to sharpen your skills?
11. How clear are you with understanding your job expectations?
12. What kind of job does your supervisor do when explaining your job expectations?
13. What do you think about our leadership?
14. Anything we can do to make sure we include your voice or keep you informed about what's happening in the company?
15. How comfortable are you with interacting with our CEO/executive staff?
16. What is important to you to make sure you do your best job?
17. Is there anything else you'd like to share about your experience thus far?

Three-Month Onboarding Plan

(Sample Checklist)

Employee Name: _____

Date: _____

Department: _____

Supervisor: _____

Week 1:

- Go over policies, procedure, department-specific protocols, etc.
- Take a tour of office/facilities, learn emergency exits, workplace safety.
- Learn about the vision, mission, core values, and company culture.
- Learn interesting facts and company history.
- Learn about major task assignments and projects that relate to your job.
- Attend a welcome lunch with colleagues and supervisors or another social event.
- By the end of this week, you should have an overall, general understanding of what your job entails and how it is relevant to your department/company.

Week 1 Notes:

Week 2:

- Continue working on items from week 1 if you didn't finish.
- Meet with key team members, supervisors, managers, internal customers to begin building positive working relationships.
- Attend "coffee with the president" along with new staff as a meet and greet and opportunity to ask the president any questions.
- Get a schedule for regular meetings and required training.
- By the end of this week, you must be able to meet standard A of job duty/responsibility A.

Week 2 Notes:

Week 3:

- Continue working on items you have not finished from previous weeks.
- "Learning the Ropes" Activity: Meet with an assigned veteran employee or newbie employee to discuss their experience with the company and they can offer any insights into the culture and ways for navigating the organizational structure.
- By the end of this week, you must be able to meet standard B of job duty/responsibility B.

Week 3 Notes:

Week 4:

- Participate in a fun interactive game to quiz your knowledge about our mission, history, your job, and our overall business goals and objectives.
- Have your first structured, one-on-one check-in meeting with your supervisor to assess your progress and comfort level with our organization.
- By the end of this week, you must be able to meet standards A-C of job duty/responsibility A-C.

Week 4 Notes:

Week 5:

- Work on items or projects identified during your check-in meeting from the previous week.
- Wrap-up all the meetings with managers/department heads if you haven't done so already. The purpose of these meetings is to learn what each area/department is responsible for and how they contribute to the "big picture." Think about how your job fits in the "big picture."
- By the end of this week, you must be able to meet standard D of job duty/responsibility D.

Week 5 Notes:

Week 6:

- Work on onboarding items from previous weeks that you have not completed.
- Participate in the social event quarterly fun meetings or lunch with a veteran employee or newbie employee just to enjoy, relax, and learn and become more comfortable with your colleagues.
- By the end of this week, you must be able to meet standard E of job duty/responsibility E.

Week 6 Notes:

Week 7:

- If you have not done so previously, participate in strategic meetings or meetings with the supervisor to make sure you understand how your job contributes to the bigger picture.
- This is an informational meeting with FAQs. You get a chance to give your input and ask questions.
- By the end of this week, you must be able to meet standard F of job duty/responsibility F.

Week 7 Notes:

Week 8:

- Participate in the second structured one on one check-in meeting with your supervisor to discuss your progress and assess your overall comfort with the company.
- By the end of this week, you must be able to meet standard A-G of job duty/responsibility A-G.

Week 8 Notes:

Week 9:

- Work on items identified during last week's meeting with your supervisor.

- Participate in any quarterly meetings or social events sponsored by the company.
- By the end of this week, you must be able to meet standard H of job duty/responsibility H.

Week 9 Notes:

Week 10:

- Work on self-development opportunities provided by the company and any additional training on competencies needed to perform your job.
- By the end of this week, you must be able to meet standard I of job duty/responsibility I.

Week 10 Notes:

Week 11:

- If you have not done so already, wrap-up all the required training provided by the company.
- Develop your daily and weekly routine list and make sure you share this with your supervisor for input and approval.
- Wrap-up all pending onboarding items you have not completed from previous weeks.
- By the end of this week, you must be able to meet standard J of job duty/responsibility J.

Week 11 Notes:

Week 12:

- Participate in the third and final structured one-on-one conversation with your supervisor to assess your progress and overall comfort level with your job and the company.
- By the end of this week, you must be able to meet all the standards (A-J) of your job duties/responsibilities (A-J).

Congratulations! Participate in the celebration team lunch.

Week 12 Notes: