



First Hire Planning & Readiness Checklist

Companion resource for Chapter 24: You've Decided to Hire—Now What?

Use this checklist to turn the decision to hire into a practical plan.

1. Prepare the Business	
☐	Clarify your culture: Put your mission, vision, values, and other guiding principles into words you can consistently use to lead and make employment decisions.
☐	Identify work to delegate: List the recurring tasks and responsibilities that are ready to move off your plate.
☐	Define the role: Create a job description that explains the core work, priorities, skills needed, schedule expectations, and what success should look like.
☐	Choose your timing: Set target dates to begin recruiting and to have the employee start before workload pressure forces a rushed decision.
☐	Research market pay: Use the role, location, and industry to understand a realistic compensation range.
☐	Build the budget: Include wages, payroll taxes, workers' compensation, software and supplies, benefits or perks, and training time.
☐	Plan for cash flow: Decide what reserve or recurring revenue you want in place before adding the new employment expense.
☐	Document how work gets done: Create the SOPs, job aids, checklists, process maps, approval workflows, decision guides, and communication standards the role will need.
☐	Gather reference materials: Organize contact lists, software instructions, client/customer information, and other resources a new employee will need to work independently.
☐	Build the training plan: Map out what the employee should learn first, who will teach it, and a reasonable timeframe for becoming proficient.



2. Create the HR & Payroll Foundation

☐	Research the rules that apply: Use federal and state labor agencies and other official sources to identify requirements based on where the employee will work and your industry; get professional guidance when questions remain.
☐	Cover the major compliance areas: Review wage and hour rules, labor law posters, workers' compensation, leave requirements, screening, worker classification, discrimination/accommodation, and required notices.
☐	Set core HR policies: Write down the basics that employees will need to know, such as work hours, timekeeping, attendance, time off, conduct standards, and pay practices.
☐	Design onboarding and hiring paperwork: Map the process from accepted offer through the first weeks, and prepare the offer letter, required new-hire paperwork, and company-specific forms or agreements.
☐	Prepare culture materials: Make your mission, vision, values, and other guiding principles part of the onboarding materials.
☐	Choose the payroll platform: Prioritize a provider that will file and pay payroll taxes automatically, then evaluate ease of use, electronic onboarding, customer service, HR features, timekeeping (if needed), and , bookkeeping integration.
☐	Confirm payroll lead time: Know how long platform setup and tax registrations may take so payroll platform can be ready before the employee needs to be paid.

Recruiting Preparation

☐	Define success characteristics: Identify the traits and work style someone will need to succeed in this role and in your business.
☐	Prepare interview questions: Use consistent, role-related questions that help you evaluate problem-solving, collaboration, and the requirements of the job.
☐	Create the job advertisement: Use the job description plus the reasons someone would want to join your business to create an accurate, engaging posting.
☐	Choose recruiting channels: Decide whether to use your network, job boards, recruitment platforms, referrals, and/or a professional recruiter.
☐	Prepare for candidate questions: Be ready to explain the role, schedule, compensation, business stage, expectations, and what working with the company will actually be like.



3. Hire & Onboard

☐	Recruit without rushing: Give yourself enough time to compare candidates and avoid hiring simply because the workload has become urgent.
☐	Look beyond the resume: Use interviews to understand how candidates think, solve problems, communicate, and collaborate - not just job history.
☐	Hire to complement the business: Look for someone who can contribute new strengths and ideas rather than trying to find a copy of yourself.
☐	Make and document the offer: Confirm the employment terms and send the formal offer and next-step instructions.
☐	Send paperwork early when possible: Use electronic onboarding or advance paperwork so the first day can focus more on connection, expectations, and learning.
☐	Complete payroll and system setup: Have employee records, tax setup, timekeeping, accounts, equipment, and system access ready before the start date.
☐	Start with the “why”: Walk through the mission, vision, values, and purpose of the business before diving into duties, tools, and processes.
☐	Review expectations: Discuss the job description, work standards, communication expectations, policies, schedule, and where to go for help.
☐	Use the training plan: Follow the SOPs and job aids you prepared, while leaving enough room for questions, repetition, and adjustment.
☐	Schedule early check-ins: Create frequent opportunities to answer questions, give feedback, and understand what is or is not working.
☐	Keep documentation current: Update processes, job aids, and training materials as you learn what the role actually needs.
☐	Build culture every day: Use your values in day-to-day decisions, ask for feedback, celebrate wins, and reinforce the connection between the employee’s work and the business mission.



My First-Hire Action Plan

Use this page to turn the checklist into dates, decisions, and specific next actions for your business.

Position / role	
Recruiting start date / target start date	
Employee work location / state	
Target pay range / estimated monthly employment budget	
Payroll platform / target go-live date	
Top tasks I am ready to delegate	
Processes I need to document first	
First-week training priorities	
Recruiting channels I will use	
Professional help or questions I need to resolve	
One cultural behavior I want to model from day one	