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The First Hire Checklist

There is no perfect time to hire your first employee! This can also be a daunting task for anyone, especially a solo practitioner who is wearing many hats in building their business.

- ✓ What opportunity is captured by hiring this person?

- ✓ Cross Check with your insurance agent
 - Liability
 - Unemployment
 - Disability
 - Workman's Comp
 - Benefits
 - Other?

- ✓ Cross Check with your accountant / payroll rep
 - Understand True Cost
 - Understand Payroll Process

- ✓ Role Description
 - What is the purpose of this role?
 - What are the responsibilities and tasks?
 - What results should be achieved?
 - What is the compensation structure?

✓ Onboarding and Training Plan

- How will I train this person?
- What should they know at 30/60/90 days?
- What are the resources I can leverage to help?

✓ Interview/Selection Process

- What will your interview process look like?
- What are your non-negotiables?
- What assessments or assignments will you use?

✓ Things You Should Know Document

- In being fully transparent, what are the things the new hire should know about how you operate, before they accept?

✓ Offer Letter

- Background check process
- Anticipated Start Date

✓ Technology and Other Access

- Email address set up
- Access to shared documents and files
- Access to other programs necessary
- Office Access