THE *Newbie's Guide* TO HIRING A TEAM MEMBER

STEP #1

Identify Where You Need Help

Before you hire anyone, you must figure out where you need the most support in your business. You've got to identify the best place to start building your team. If you've been doing everything in your business, you may not be able to see where someone else may fit into the bigger picture. So, let's figure it out!

#1 - Find your Zone of Genius

Your zone of genius is the place where you feel like you're living your dream life and helping people in the way you desire to help them. Activities in your Zone of Genius generate income, energize you, feel like fun, and come naturally to you.

Fill out the columns below to identify your Zone of Genius and what tasks you may want to outsource.

ZONE OF GENIUS	POSSIBLE TASKS TO OUTSOURCE
Which business activities energize you and make you feel alive?	Which tasks drain and exhaust you—even just thinking about them?

Which parts of the business make time fly and feel like fun?	Which parts of the business make time drag?
Which activities come naturally and inspire you to wake up each day?	Which activities frustrate or bore you - or make you procrastinate?
Which activities generate income directly?	Which activities prevent you from making money because you have to do them?

#2 - Identify Areas of Your Business to Outsource

Take the tasks in the second column above and categorize them into areas of business. (Customize the categories below based on your business.) Then highlight the ones you want to outsource.

Administrative	Finance/Accounting	Technology
Customer Service	**Design**	**Marketing**
Business Development	**Sales**	**Content Creation**
Other ________________	**Other ________________**	**Other ________________**

Out of the tasks above that you want to outsource, you may be able to eliminate some. Answer these questions to get more specific about which tasks you need to outsource first.

a) Which of these tasks could you reduce greatly or eliminate altogether by automating?

b) Which of these tasks makes me lose money if I perform it myself?

c) Which of these tasks do I need to outsource right now?

d) Which of these tasks can be grouped together and/or completed by one resource?

#3 - Choose Which Role You Will Outsource First

Assess your results from above. What area of business will you outsource first? Here are some of the most common contract and freelance roles based on categories.

Virtual Assistant - Administrative Travel arrangements Email management Event planning Scheduling Data entry Marketing (blogging, social media management) Bookkeeping Research Customer service Presentations	**Digital Marketing Consultant - Marketing** Social media marketing and management Email marketing Blogging Sales funnels Automation Pay per click ads SEO Video production Copywriting Presentations	**Accountant/ Bookkeeper - Financial** Bookkeeping Taxes Payroll processing Invoicing Accounts receivable Accounts payable Balancing ledgers Financial statements Financial guidance Analysis Planning
Web Designer/ Developer - Technology Website maintenance Web design Coding Programming App creation	**Writer - Marketing and Content Creation** Copywriting Sales copy eBooks Blogging Video scripts Digital products Emails Webinars Presentations	**Graphic Designer - Design** Website images Social media images Presentations Business cards Logos eBooks Infographics
IT/Tech Specialist - Technology Computer help Systems administration Technical assistance	**Project Manager - Administrative** Project management Quality assurance Budget planning	**Customer Service Rep - Customer Service** Answer emails Process refunds

Check the boxes of which role you'll hire first. If you prefer, you can number them in order of priority, instead of making a checkmark.

- ❑ Virtual assistant
- ❑ Marketing consultant
- ❑ Writer
- ❑ Bookkeeper
- ❑ Accountant
- ❑ Web designer/developer
- ❑ Graphic designer
- ❑ Customer service representative
- ❑ Business manager
- ❑ Project manager
- ❑ Affiliate manager
- ❑ IT/Tech specialist
- ❑ Photographer
- ❑ Other____
- ❑ Other____

#4 - Determining Your Budget

- How much money you will save - and make - by having someone else perform the task
- How much expertise is needed vs. how much expertise the person has vs. how much expertise you have
- How fast the person can do it vs. how much the person charges per hour vs. how much you'll lose per hour in billable time, if you do it
- Whether or not this will result in profit or loss to you

EXAMPLE

Task: Processing Refunds/Cancellations

YOUR RATE: $100/hour Time it takes you per month: 10 hours Income lost: -$1,000	VIRTUAL ASSISTANT RATE: $10/hour Time it takes a month: 15 hours Income you made by outsourcing: $1000 Cost of team member: $150 Profit after paying team member: $850

1. Write down exactly which tasks and duties you need your chosen professional to do.

____

____

____

____

2. How many hours per month will you need from your contractor?

Type of contractor	Weekly hours	Monthly hours	Budget
			$____________
			$____________
			$____________

3. How much money are you saving at the end of a three-month period (by not doing the work yourself)?

$ ________________

4. How much money are you now making at the end of a three-month period (by focusing on more revenue-generating tasks instead of non-revenue generating tasks)?

$ ________________

5. How much did you spend on outsourcing?

$ ________________

TOTAL PROFIT OR LOSS
$_____________________

If you forecast a profit, then you have the budget to hire a team member. If you calculate a loss, then it's not necessarily the right time to hire a team member.

STEP #2

Build a Team-Ready Foundation

Now that you know what role you need to hire and your budget, it's time to build a foundation that can support a team.

Before you hire anyone, you need to put your ducks in a row so that you're organized, prepared, and ready to take on a team member.

Creating structure and systems in your business not only helps your team but also helps you keep your sanity. Plus, getting organized now means that you'll be able to take on more team members in the future.

What you need in place before hiring a team member:

- Standard operating policies and procedures manual ("SOP")
- A communication system
- A project management system
- Legal agreements and employment laws
- Accounting and payment system
- Mission statement/Company values statement (optional but recommended)

#1 - Standard Operating Procedures (SOP) Manual

What is an SOP Manual?

A set of step-by-step documented instructions that helps team members carry out routine operations. The goals of an SOP are to achieve:

- Efficiency
- Quality output
- Uniformity of performance

And to reduce:

- Miscommunication and confusion
- Failure to comply with protocol, preferences, or guidelines

There are basically two steps to creating your SOP:

e) Identify or create a specific, detailed procedure
f) Document that procedure step-by-step

What to Include in Your SOP Manual

- ❑ **Company policies**

    > Explains policies related to business operations and human resources

    For example:

    - ❑ Organizational chart
    - ❑ How/when team members get paid
    - ❑ How much notice is needed for time off
    - ❑ Availability and Official Work Hours
    - ❑ Secure password policy

- [ ] **Procedures and checklists**

> How to perform specific tasks, guidelines related to those tasks, and optional checklists to guide team members through procedural steps

For example:

- [ ] How to format and publish a blog post
- [ ] How to process a customer refund
- [ ] How to retrieve voicemail messages
- [ ] How to set up a company email account

- [ ] **Master forms and templates**

> Identify the company's master documents and how to access them

For example:

- [ ] Request for Vacation Form
- [ ] Reimbursement Form
- [ ] Social media design templates
- [ ] PowerPoint presentation templates

- [ ] **URLs and tools**

> How to access the company's online tools and apps that are used frequently for performing work

For example:

- [ ] Communication system URL (ie. Slack channel)
- [ ] How to Use LastPass (for login sharing)
- [ ] Project management system URL

❑ **Brand style and design guide**

> Outline the company's brand information related to repetitive design or formatting elements - like color palette, logo, fonts, writing standards, etc.

For example:

- ❑ The hexadecimal codes for logo colors
- ❑ Punctuation and grammar preferences (ie. APA vs MLA styles)
- ❑ H1, H2, and H3 formatting protocol
- ❑ Imagery guidelines

#2 - Communication System

Choose and setup how you will communicate with your team members:

- ❑ Online messaging - Slack or project management app
- ❑ Online meetings/video conferences - Zoom, Skype
- ❑ Telephone
- ❑ Scheduling - shared, accessible calendar system (Google)
- ❑ File sharing - Dropbox, Google Drive
- ❑ Email

Don’t forget to include the information about the ways to communicate in the SOP!

#3 - Project Management System

Select a centralized location to manage and track internal (and client) projects online. Some options:

- ❑ Monday.com
- ❑ Basecamp
- ❑ Teamwork.com

If you hire remote workers, you may decide to invest in a time-tracking tool.

Time-tracking tools integrate with project management platforms, which is convenient. They help manage your team's productivity, and they track your team's activity. These are important when you manage a remote team.

Some options
:

- ❑ Time Doctor
- ❑ Tsheets

#4 - Legal Agreements and Employment Laws

First things first...make sure your business is officially a business! Depending on your business, may need:

1. Federal Employer Identification Number
2. State registration

What you need to plan for next depends on whether you're hiring an employee or a contractor as well where you live. So, these items differ for every person. **Your best and safest bet is to consult with a professional.**

Not sure whether to classify your hire as a contractor or as an employee? Refer to the IRS Classification Guide for help. If you're still unsure, you can fill out IRS form SS-8 for help BEFORE you hire someone.

In general, here are some - but not all! - of the things you may need in place to comply with laws and protect yourself legally.

Contractor	Employee
❑ Independent Contractor Agreement ❑ Non-disclosure Agreement ❑ Confidentiality Agreement ❑ Non-compete Agreement ❑ Ownership rights ❑ IRS Form W-9 ❑ 1099-MISC form (one for contractor, one for IRS) ❑ Invoices from contractor for payment	❑ Form I-9 ❑ Form W-4 ❑ Form W-9 ❑ New hire report - check your local state's requirements ❑ Non-compete and confidentiality agreements ❑ Equal Employment Opportunity compliance ❑ Written permission for background check

#5 - Accounting and Payment System

When you hire help in your business, you'll have obligations like payroll, 1099 forms, and other state and federal HR laws that must be followed. An accounting and payment system makes this easier and more automated.

Popular options include:

- QuickBooks
- FreshBooks
- Wave
- Xero

#6 - Mission Statement/Company Values Statement

Although optional, a mission statement or company values statement communicates the kind of culture or environment that you want to establish and maintain.

You can certainly hire your first team member without a mission statement or without your company values defined. But you probably want to hire people who align with your values, goals, mission, and purpose, right?

When you share with others what you're passionate about, who you serve, why you are doing what you're doing, and your brand values, you'll attract others who have similar values and goals.

So, I think this step is helpful if you want to grow a team that's excited about who you serve and what you do.

Create a Mission Statement or define your company values by answering these questions and including this information in your SOP:

- What is your why?
- Who do you serve?
- What values are most important to you - in life and in business?
- What words describe your company?
- What is your company culture and brand?

STEP #3

Hire the Right Person

It's finally time to find and hire your first team member!

In this step, you'll need to:

- Create a job description
- Find candidates
- Interview candidates
- Follow up and make a decision
- Hire the best candidate

NOTE: The hiring process and requirements could differ per state and geographical location. So, be sure to check with a professional!

KIM Garst

#1 - Create a Job Description

Outlining a job description helps your candidates, but it also helps you better understand what you're looking for in a candidate. So, create a job description whether or not you plan to advertise the job publicly.

A job description summarizes the responsibilities, tasks, qualifications and skills that are expected of a person for a particular role. These parameters help candidates figure out if they're qualified for the position. And - these parameters give you an internal checklist to compare against when you're interviewing candidates.

Pay attention to anti-discrimination and equal opportunity laws! Stay away from putting anything about race, gender or age in your description.

Here are some items to include in your job description:

- ❑ Pick a keyword specific job title
- ❑ Job and education requirements
- ❑ Day to day tasks
- ❑ Skills required
- ❑ Physical demands (if any)
- ❑ Your brand and personality
- ❑ Benefits
- ❑ Who the position reports to
- ❑ Pay range
- ❑ Date the job closes/Start date

#2 - How to Find Candidates

Now it's time to locate candidates. There are lots of options!

1) Advertisements
2) Personal recommendations
3) Elite contractor/consultant lists
4) Online directories or job boards
5) Business/professional organizations

Advertisements

There are paid and free options for advertising your open job position. Here are a few suggestions:

- ❑ FlexJobs
- ❑ HireMyMom
- ❑ We Work Remotely
- ❑ OnlineJobs.ph (for workers specifically in the Philippines)
- ❑ Monster
- ❑ Indeed
- ❑ ZipRecruiter
- ❑ Glass Door
- ❑ Your website
- ❑ Social media
- ❑ Private online groups
- ❑ Email list

Personal Recommendations

Your personal and business connections may be a great resource for finding your first team member! Just remember to consider the source. Some recommendations may hold more weight than others.

- Friends
- Colleagues
- Family
- Coaches
- Mentors
- Clients
- Email list
- Other consultants

Elite Contractor or Consultant Lists

Along the lines of recommendations, did you know that you can access other people's contractor lists? This is another option for finding good candidates. For instance, some coaches and businesses will give you access to their experts - often for a fee.

- ❑ Coaches
- ❑ Industry Influencers
- ❑ Brands
- ❑ Businesses

Online Directories or Job Boards

Which directories or job boards you choose to use will depend on your budget and your needs. The options range from searching for candidates in an online database to having an outside company manage the whole hiring process for you for a fee. Be sure to read reviews! Here are some suggestions:

- ❑ Hubstaff Talent
- ❑ Outsourcely
- ❑ Freelancer.com
- ❑ Upwork
- ❑ Workshoppers
- ❑ Virtual Staff Finder

Business or Professional Organizations

There are organizations that you can join to make connections and network. Some of these groups even have their own in-house directories where you can find candidates. If you belong to a business or professional organization, it may be a terrific resource for finding good candidates. Here are some suggestions:

- ❑ Local Chamber of Commerce
- ❑ Industry or trade associations
- ❑ Meetup.com
- ❑ BNI

Make a list of candidates and then move on to the next step!

#3 - Interview the Candidates

Once you have a list of candidates, it's time to contact them and set up face-to-face interviews - either in person or via video conferencing.

But prepare first! Create a checklist of questions that you'll ask each candidate. Then you may want to jot down some notes for custom questions based on each candidate's resume. Included on the next two pages is a possible template you can use for your Interview checklist. Modify it to fit your needs.

It's important to understand that your interview questions help reveal more about the candidate. You want to get details about the type of work they've done, the types of problems they've had to solve, and their areas of specialization. The more real-life examples they provide, the better!

Interview Checklist

Candidate Name ____

Candidate's Location ________________ Email ____________________

Question	Notes
How would you describe your work style?	
What techniques and tools do you use to keep organized?	
What are three positive character traits your friends or colleagues would say about you?	
If an assignment was too difficult for you, how would you manage it?	
What were the responsibilities of your last position?	
Why are you leaving your current job? What did you like least about your last job?	
What did you like best about your last job?	
Why do you want this job? Why would you be a good fit for this job? Why should I hire you?	

Question	Notes
Give me an example of a time that you felt you went above and beyond the call of duty at work.	
If you discovered a big mistake after you'd submitted a project, what would you do?	
Are you a big-picture person or a detail-oriented person?	
How do you feel about taking no for an answer?	
What are your career goals?	
Who is your hero or mentor?	
Will you please provide three references?	
What salary are you seeking?	
Do you have any questions for me?	

#4 - Do Your Research

Once your interviews are done, it's time to narrow down your choices and find the best person for the job. It's time to research your final candidates online. You want to find out more about the candidate's life outside what they are telling you.

- ❑ Check their references
- ❑ Read online reviews about them (if applicable)
- ❑ Research them on Google search
- ❑ Review their social media accounts
- ❑ Invest in a background check and illegal drug testing

#5 - Hire the Best Candidate

You've interviewed candidates and researched them, so it's time to decide which person to choose.

Option A - Make Them an Offer

If you believe you've found the right match for your business and you're ready to move forward with hiring, extend an offer to the person. You'll need some type of legal agreement in writing that you both sign. This could be a letter, a consulting agreement or a contract.

What to Include in the Offer Letter, Agreement, or Contract:	
• Job title and description • Compensation • Payment cycle • Benefits (if applicable) • Start date • Work schedule • Who they report to • Conditions of employment • Signature area	• Expenses • Contract termination • Dispute resolution • Limitations of liability • Legal names • Confidentiality/NDA • Non-compete • Employment status/type • Intellectual property

Option B - Try a Trial Period or Project First

If you're uncertain about the candidate you've selected, you could hire the person on a trial basis. In this scenario, the person works on one specific project or they work for a specific time frame - like 30 days. Then you review how it went and decide if you want to continue to work together.

Use the following checklist to assess your candidate at the end of their trial project/ time frame.

Contractor Trial Assessment for ___________________________

Question - Select answer	Result - Circle one
How accountable was the contractor? ❑ Very ❑ Satisfactory ❑ Erratic ❑ Not accountable	Positive Negative Neutral
Did the contractor meet your deadlines? ❑ Yes ❑ No ❑ Disappeared and abandoned project	Positive Negative Neutral
Does this contractor work well independently and without the need of constant direction? ❑ Yes ❑ No	Positive Negative Neutral
Does this contractor work well independently and without the need of constant direction? ❑ Yes ❑ No	Positive Negative Neutral
How easy and satisfying was it to work with this particular contractor? ❑ Awful ❑ Adequate/Average/Satisfactory ❑ Exceeds expectations	Positive Negative Neutral
Can this contractor grow with you and your business naturally and comfortably? ❑ Yes ❑ No	Positive Negative Neutral
Would you use this contractor again? ❑ Yes ❑ No ❑ If there was no one else available. ❑ For infrequent, specific tasks only.	Positive Negative Neutral

STEP #4

Onboard and Train for Maximum Success

Once you've chosen a contractor and they've passed any trial period you may have set up, now comes the really vital part of team building: you must make this person feel like part of your team.

Onboarding and training your new team member will help them perform their tasks better and work toward the common goals with the same enthusiasm as you do.

It's time to take care of administrative housekeeping and guide your new team member so they get acclimated to your systems, your business, and to you!

#1 - Onboarding - the Basic Checklist

Onboarding refers to the process of bringing someone on board to make them a team member.

Onboarding is mostly administrative tasks like filling out human resources paperwork or giving your new team member a company email address and phone number. You're setting your new team member up to be able to work in your business.

Here are some of the items you'll need ready for when your new team member starts.

- ❑ HR paperwork (forms)
- ❑ Legal agreements/contracts
- ❑ Email and phone
- ❑ Logins and passwords
- ❑ Access to systems, tools, resources
- ❑ Technology - computer, mouse, etc.
- ❑ Business cards
- ❑ Office (access, desk, etc.)
- ❑ Branded swag
- ❑ Company values, mission
- ❑ Performance plan and goals

#2 - Training Process and Guide

Whereas onboarding sets your team member up to work in your business, there's still training for what comes next.

You need to have an official training process in place for new hires. In other words, how does the new team member begin to train? What's the first step? What's the second step? Does the training include meeting with you or another person?

Map out your training process. Use lists, checklists, flow charts - whatever works for you. You may even want to include how-to videos from tools you use. **Write down the process just as if you yourself were going through training for the job. This will help you for the next step!**

- ❑ Step 1: Create a Training Process
    - ❑ Map out the journey your new hire takes to train for their role
    - ❑ Include steps, people to meet with, online training to complete

Once you have the process outlined, it's time to develop a training guide. We discussed creating a Standard Operating Procedures Manual. This could be your training guide. If you want to get more advanced, you could create a training guide using an online app.

Most important is making sure your training guide walks your new team member through your business systems, processes, and procedures. They will use this guide as a reference to perform their tasks, so take it seriously!

- ❑ Step: Create a Training Guide
    - ❑ Standard Operating Procedures - Manual (Google Drive)
    - ❑ Online guide (apps like Trainual, Lessonly, or online course platforms)
    - ❑ Systems
    - ❑ Processes and procedures
    - ❑ Rules, expectations, internal policies

Congratulations on taking a big step in growing your business by hiring your first team member!