

The logo for 'upflip' is positioned in the upper center of the image. It features the word 'up' in a light orange color and 'flip' in white, both in a lowercase, sans-serif font.The main title of the document is 'HIRING EMPLOYEES Checklist'. 'HIRING EMPLOYEES' is written in large, bold, white, uppercase letters. 'Checklist' is written below it in a smaller, orange, cursive-style font. The text is centered over a clipboard that holds a document with a checklist.The word 'BOARDING CHECKLIST' is printed in a small, white, uppercase font on a black background at the top of the document on the clipboard.The document on the clipboard contains several lines of text, including: 'Use of a checklist to onboard new employees based on SOP-123: Hiring the highest', 'Employees following a role with a skilled candidate', 'Please do not skip any steps in the order provided will', 'Start Hiring Process', and 'Research the current market'. A black pen is lying on the right side of the document.

Hiring Employees Checklist

Use our hiring checklist to onboard new employees based on SOP-123: Hiring Employees. Following these steps in the order provided will provide the highest likelihood of filling a role quickly with a skilled candidate.

Please do not skip any steps.

Start Hiring Process

Research the current market

Before you start looking for employees, you need to establish what the job market is like in your area.

- Research keywords people search to find your jobs.
- Save top 10 keywords that are not mentioning specific companies.
- Research pay levels on Indeed.com.
- Take note of the top 25% of hourly and salary ranges.

Create a job description

In this section, you'll focus on writing a job description. The description should include:

- Title (Use top keyword)
- Pay (Use top 25% of pay to attract best candidates)
- Description of Company Work Environment
- Skill Sets
- Description of Responsibilities
- Experience and Educational Requirements (Reduce requirements if struggling to fill positions)

Share the Job Description

Share the job description in the following locations:

- Employee email list**
- Job title email list**
- All social media channels (edit your list to your specific channels)**
- Share the posting on job boards.** You don't have to do paid promotion at first, but it might help if you need an employee fast.
- Contact a staffing agency.** Discuss your needs and budget with them.
- Run paid ads if necessary**

Onboarding

This process will start once the new hire signs the job offer. The process takes at least one week to complete. So the start date should be at least one week after the date the new hire signs the job offer.

- Confirm the accepted job offer (HR or automated system).
- Confirm start date (Automated system or HR).
- Send a welcome email to the new employee (Automated System or HR).

Prepare new hire paperwork

These documents should be compiled when implementing an HR system and updated as needed. The business owner or HR professional should review them before sending them to the new hire. The new hire is responsible for filling them out and returning the documents.

- Job description
- Tax forms (i.e., W-4 or W-9)
- Benefits literature

- Employee handbook
- Non-disclosure, non-compete or other legal documents
- Employment contract

Procurement

These steps can either be automated or managed by the appropriate person. Typically the small business owner or a manager. In larger companies, these roles may involve IT and Procurement. We have included who would handle them in larger companies.

- Computer including accessories (Procurement)
- Phone (Procurement)
- Access to shared devices (printer, copier, fax machine, etc.) (IT)
- Mobile phone, tablet, or other additional job-specific devices (Procurement)

Employee Software Access

The following checklist items will normally be performed by your software system administrator or an automated system. The security clearance will be submitted to the proper legal authorities by the business owner, HR professional, or the new hire.

- Email
- Time clock system
- Access to CRM
- WiFi access
- Voicemail (New hire should set up)

Add the employee to relevant email distribution lists

- Project management software
- Other job-specific software
- Request security clearance (if applicable)

Set up workspace

The items on this list can be done by the business owner, admin, or supervisor of the new hire.

- Provide a workplace (unless remote)
- Provide necessary furniture
- Provide necessary office supplies
- Provide welcome kit

First Day

The Supervising manager should be responsible for the following tasks.

- Greet the new employee.
- Provide an access card, or badge (If applicable)
- Give the employee a tour.
- Introduce the new employee to the team.
- Connect the new hire to the team in a group email.
- Provide lunch for the team (Local teams only).
- Provide a training plan.

Orientation

Most small businesses will have a small business owner or trusted team member perform these tasks. In larger businesses, you might want to have a skilled trainer provide orientation. This can be especially important if you are in a skilled field.

- Complete any new hire paperwork that has not already been completed.
- Discuss safety policies and show how to follow them.
- Review the employee handbook and answer questions about it.
- Explain the technology policies and who to ask for support.
- Discuss benefits.
- Review insurance plans.
- Provide a peer mentor.

Schedule Routine Check-ins

The supervising manager or HR may want to perform regular check-ins to verify that the employment is going smoothly. If there are performance issues, addressing them early can save the company a lot of money. Firing a person after the state's probationary period will often mean your company has to pay unemployment.

- Ask for feedback on the hiring process.
- Schedule a check-in for the end of the new hire's first week.
- Schedule a second check-in after 30 days.
- Schedule a third check-in after 60 days.
- Schedule a 90-day check-in.