

Hiring, Onboarding & Managing Your First Team — Workbook

This workbook turns the course into a working people-operations toolkit you can use to make a real hire. Work the four sections in order: first define the role and write the posting, then build a structured interview and selection process, then make a compliant offer and design a 30-60-90 onboarding plan with KPIs, and finally set up the management routines that keep your team productive. Pick one role you actually intend to hire for and fill every template with its real details, the tasks you want off your plate, the pay range, and the outcomes you will measure. The spreadsheets are built to be reused on every future hire, so you walk away with a repeatable system rather than a one-time scramble.

Defining the Role and Attracting Candidates

Turn a vague need for help into a defined role with a scorecard and a job posting that attracts the right applicants.

Exercise: Run a Time Audit and Pick the Role

Track your own work for one to two weeks, sort each task into the four buckets, and use the result to define what your first hire should take over. Put a dollar value on the hours you would buy back.

- Which recurring tasks fall into the delegate bucket, and roughly how many hours per week do they consume?

- What is one hour of your highest-value work worth, and what is the weekly opportunity cost of doing the delegate-bucket tasks yourself?

- Is this first role better served by a flexible generalist or a narrow specialist, and why?

- Write the one- or two-sentence mission for the role: why does this position exist?

Worksheet: Role Scorecard

Define success for the role before anyone applies, using the mission, outcomes, and competencies structure. Make every outcome measurable with a number and a timeframe so it can later become a KPI.

Role mission (one or two sentences on why it exists)

Outcome 1 (measurable result with number and timeframe)

Outcome 2 (measurable result with number and timeframe)

Outcome 3 (measurable result with number and timeframe)

Competency 1 and why it matters for the outcomes

Competency 2 and why it matters for the outcomes

Competency 3 and why it matters for the outcomes

Two or three genuine must-have qualifications

Checklist: Job Posting Readiness Checklist

- The job title is searchable and matches what candidates actually type
- The posting opens with two or three honest sentences on the business and the mission of the role
- Responsibilities are written as outcomes and day-to-day activities drawn from the scorecard
- Must-have qualifications are short and separated from nice-to-haves
- A competitive pay range is included, researched against Indeed Salary, Glassdoor, or BLS data
- Schedule and location or remote status are stated clearly
- The application process is short, with at most one screening question

Screening, Interviewing, and Selecting

Build a structured, behavior-based hiring process that predicts on-the-job performance, stays legal, and makes candidates genuinely comparable.

Exercise: Build Your Behavioral Question Set

Write the same set of structured behavioral questions you will ask every candidate, each tied to a competency on your scorecard. Draft the follow-up probes you will use to get past rehearsed answers.

- For each top competency, what tell-me-about-a-time question will reveal whether the candidate has it?

- What does a strong STAR answer (Situation, Task, Action, Result) look like for your most important question?

- What follow-up probes will you use to dig past a polished surface answer?

- Which two or three must-haves will you confirm on the fifteen-minute phone screen before interviewing?

Worksheet: Candidate Scorecard

Immediately after each interview, rate the candidate one to five on each competency and capture the evidence. Fill one of these out per candidate so you can compare them on the same standard rather than on feeling.

Candidate name and date interviewed

Competency 1 score (1-5) and supporting evidence

Competency 2 score (1-5) and supporting evidence

Competency 3 score (1-5) and supporting evidence

Strongest STAR example they gave

Concerns or red flags (vague or we-based answers)

Reference check result: would the former manager rehire them?

Overall recommendation (advance / hold / pass) and why

Checklist: Legal and Fair-Hiring Checklist

- Every interview question is tied to the candidate's ability to do the job
- No questions about age, race, religion, national origin, marital or family status, pregnancy, or disability
- All candidates are asked the same core questions in the same order
- Scores and notes are written down during or right after each interview
- At least two references (preferably former managers) are checked before an offer
- Any background check uses written consent and a compliant FCRA adverse-action process
- The hiring decision is documented and based on scorecard evidence, not a last impression

Offer, Onboarding, and the First 90 Days

Make a compliant offer, complete the required paperwork, and design a 30-60-90 onboarding plan with KPIs that gets the new hire productive and reduces early turnover.

Checklist: New-Employer Compliance Checklist

- Written offer letter sent with title, pay, schedule, start date, and at-will status
- Form I-9 completed within three business days, with original documents examined
- Form W-4 and any state withholding form collected
- E-Verify run where required by state or contract
- New hire reported to the state new-hire registry within the required window
- Workers' compensation insurance in place and unemployment insurance registered
- Payroll set up through a service such as Gusto, QuickBooks Payroll, or ADP
- Required labor-law posters displayed in the workplace

Worksheet: 30-60-90 Day Onboarding Plan

Map the new hire's first three months into Learn, Contribute, and Own phases, each with written goals you will review together. Tie the day-61-to-90 goals to the measurable outcomes on the role scorecard.

Days 1-30 Learn: tools and access to set up, people to meet, SOPs to study

Days 1-30 Learn: what shadowing and early tasks look like

Days 31-60 Contribute: the defined slice of work they begin to own

Days 31-60 Contribute: what success at the 60-day check-in looks like

Days 61-90 Own: core responsibilities they should run independently

Days 61-90 Own: the scorecard outcomes reviewed at the 90-day mark

Standard operating procedures to write before they start

Weekly check-in day and time

Exercise: Set the Role's KPIs

Translate the scorecard outcomes into three to five SMART KPIs the employee can see and influence. Pair throughput metrics with quality metrics so a number cannot be gamed into bad behavior.

- What three to five KPIs best capture success in this role, each with a metric, target, and timeframe?

• Which KPI is a throughput metric, and which quality metric balances it?

• How and where will the employee see these numbers, and how often will you review them?

• Could any of these KPIs accidentally reward the wrong behavior, and how will you guard against that?

Managing, Coaching, and Performance

Set up the day-to-day leadership routines, one-on-ones, feedback, coaching, and a fair performance process, that keep good people productive and engaged.

Worksheet: One-on-One Meeting Template

Use this agenda for the recurring one-on-one with each employee. It is their meeting, so let them drive the first sections; fill it in together each week or two.

How are you doing, and how is the work going this week?

What are you working on, and where are you blocked or unsure?

KPI and goal progress since last time

My feedback for you (using Situation-Behavior-Impact)

Your feedback for me

One thing I will do to make your job easier this week

Action items and owners before next one-on-one

Exercise: Practice SBI Feedback and GROW Coaching

Draft real feedback and coaching you need to deliver, using the structured models from the course, so the conversation is specific rather than vague.

- Write one piece of corrective feedback using Situation, Behavior, and Impact, with no character judgments.

• Write one piece of specific positive feedback using the same SBI structure.

• Take a real problem an employee faces and work it through GROW: Goal, Reality, Options, Way forward.

• For one task you keep doing yourself, which rung of the delegation ladder is the person ready for, and what is the check-in point?

Worksheet: Performance Improvement Plan (PIP)

If direct feedback has not produced change, formalize the path with a fair PIP. Complete every field so the plan gives the employee a genuine route to succeed and documents that you acted fairly. Specific, measurable performance gaps tied to the KPIs and scorecard

The exact standard the employee must reach to be on track

Support and resources you will provide (training, tools, coaching, mentor)

Timeframe (typically 30 to 90 days) with check-in dates

The clear consequence if the standard is not met

Employee comments and acknowledgment

Review dates and outcome at each check-in

Checklist: Lawful, Humane Termination Checklist

- The performance issue was documented and the employee had a fair chance to improve
- The reason for termination is lawful and not discriminatory or retaliatory
- The meeting is kept short, private, and respectful, with a witness where appropriate
- The final paycheck is prepared per state timing rules
- Benefits-continuation and any required notices are ready to provide
- Company property, accounts, and access are collected or revoked
- An exit conversation or self-review captures lessons to improve the next hire

Your Action Plan

1. Run a one-to-two-week time audit, sort tasks into the four buckets, and define the role and its mission.
2. Write the role scorecard with measurable outcomes and required competencies, then turn it into a job posting with a real pay range.
3. Post on Indeed, ZipRecruiter, and your network; screen applicants against must-haves and run fifteen-minute phone screens.
4. Build a structured behavioral question set, run the same interview for each finalist, and score every candidate on the scorecard.
5. Check at least two references, decide on the evidence, and extend a verbal then written offer.
6. Complete I-9, W-4, E-Verify where required, new-hire reporting, workers' comp, and payroll setup before day one.
7. Build and run a 30-60-90 onboarding plan, writing SOPs for the tasks the new hire will own.
8. Set three to five SMART KPIs that balance throughput and quality, and review them in a recurring one-on-one.
9. Give timely SBI feedback, coach with GROW, and delegate up the ladder as the person proves capable.
10. Address underperformance early; if needed, use a fair PIP, and conduct any termination lawfully and humanely while learning from every exit.

