

HELLO

You've come a long way!

Starting a new ESD business is an exciting and formidable process. And, after all the training you've gone through, you see the value in sharing what you've just learned so you want to keep going. And, we are here to help you.

What now? Maybe you've decided to start a business. A stand-alone business or a partnership. Whichever you decide, you are going to need help whether as an extension of yourself or people that can do things you cannot.

Hiring new staff signals that you are growing; it has the added benefit of your being able to manage tasks as opposed to doing them, and it is also valuable to bring more experience and new ideas into the fold.

But creating and managing your own hiring process from scratch can be intimidating – especially without the help of a dedicated HR team. That's why we've put together this step-by-step guide to walk you through how to hire employees, from recruiting and interviewing all the way to onboarding the right new hire for your business in 12 simple steps.

Onboarding is the process that ensures new hires are ready for whatever comes at them. From procedural to cultural learnings, it begins when a candidate accepts their job offer and continues through their induction into the company and its culture.

Let's get started!

ONBOARDING

A. DESIGN || Determine and describe who you need

- Knowing what you need and want is the first step.
- Create a job description + role of responsibilities for the position you need.
- Make sure that what you are asking for is within your budget.

PRO TIP: If you are not sure exactly what you need or how to write the job description, you can tap the ESD community experts, **Power of XYZ, Inc.**, for their services. Their team has a cumulative 30+ years in ESD experience. And like the **Association of ESD Professionals**, they specialize in supporting new and established ESD-based businesses.

PRO TIP: Diversifying your workforce can bring new perspectives and enrich everyone's work experience. It also demonstrates the inclusivity we all strive for in the ESD community. Think about specific demographics you'd like to reach when writing your job ads and explain why your organization would make a great fit. Reach out to online and offline groups dedicated to certain demographics and let them know you're hiring.

B. QUEST || Get the word out – tap your community resources

Once you know what you want, it's time to find the right person.

- Advertise on the **Association's** job board located at the Career Center [[HYPERLINK "Career Center"](#)].
- Let your associates know you are looking to fill a position on your social media channels.
- If you are a member of the Association, use our community channels.
- Join every virtual event you can to get the word out. The ESD community is full of virtual events, from the Association's events to those hosted by other organizations [[HYPERLINK "Association's events"](#)].

PRO TIP: Visit the websites of large ESD organizations like NWMAF, IMPACT, **ESD Global, ESD Alliance, No Means No Worldwide, Malikah, and many others** to find virtual events and other leads in the broader ESD community.

C. DRIVE || Making the move

Inspect your haul. Review resumes and cover letters/emails to find those that meet your criteria and that resonate with you.

- You are the boss so you can decide who to hire or not.
- If you are going to be interviewing in person, start with video interviews to narrow the pool.
- Check references for added insight.
- Ask job candidates questions that are important to you. Some starter questions can include:
 - Tell me about yourself.
 - Why are you interested in this position/company?
 - What are your strengths/weaknesses?
 - What professional achievement are you most proud of?
 - Describe your ideal work environment.
- Consider a probation period to give yourself time to watch and assess a new hire.
- Don't forget to notify the interview candidates you decide not to hire.
- Interview. Test. Hire.

PRO TIP: If this is your first hire and you don't already have one, get an employer identification number (EIN) from the [IRS website](#) (you'll get your number immediately after applying! Remember to keep the notice from the IRS in your files). Register to file unemployment insurance tax reports with your state (could be employment or labor or unemployment commission/department). Fill out paperwork to withhold state and federal taxes from your employee's wages.

Set up workers' compensation insurance if it is required in your state. If you have payroll software, that will take care of some of these things.

D. ENGAGE || Tell them they are hired as soon as possible

Share the good news via phone or video call. Let them know an email is waiting in their inbox with next steps. Congratulations to the both of you!

E. COLLECT || Send your new hire their onboarding documents

Creating a healthy employee lifecycle is critical to running a tight HR ship, starting with building the employee file. Here are the basics to keep in each employee file.

TYPE	DESCRIPTION	RETAIN FILE
Application	Collect all pertinent information about your new hire.	Original
Offer Letter	Write a welcome letter with SOW and list of responsibilities.	Copy
Contract	Employee engagement/agreement.	Signed, Original
Background ✓	Depends on position - may be required due to coverage requirements.	Original
Tax Forms	W9 A consultant, independent contract, part time – invoiced payment. W4 A full time employee, taxes are taken out.	Signed, Original
I-9 Verification	A U.S. Citizenship Employment Eligibility Verification form that's used to verify the identity and legal authorization to work for all paid employees in the United States.	Original
Direct Deposit	More control and faster payment with bank-to-bank direct deposit.	Original
Info Sheet	A quick reference cover sheet for all important information.	Original
Code of Conduct	Employee reviewed and signed code of conduct agreement. Retain their signature page.	Signed, Original
Handbook	Employee reviewed and signed handbook. Retain the acknowledgement signature page.	Signed, Original

PRO TIP: The **Power of XYZ, Inc.**, has developed a customizable onboarding package to help new ESD organizations and businesses get set up for success!

F. ADMIN || Adding your new hires into your system

- Keep your new-hire documents safe in the cloud or in a passcode-protected file. If you have hard copies, keep those in a locked filing cabinet. Always remember to protect the privacy of your employees.
- Add their birthday and date of hire to your company calendar.
- Schedule their 3- and 6-month reviews and add to your company calendar.

G. CERTIFY || File "New Hire Report" with your state

- a. When you hire a new employee, you must submit the correct paperwork to your state government so you can legally embark on an employee-employer relationship.
- b. Check your [state](#) for current requirements.
- c. A copy goes into their file w/the USPS return receipt and green address card showing proof of delivery.

H. HARDWARE || Prepare for their success with tools and access

Make sure they are ready to hit the ground running with some basic tools. Not having these tools will slow everyone down and hinder engagement, so it's best to start out prepared.

- a. A company email address
- b. Logins for hardware, password management tools, role-specific software & apps
- c. Profile and logins for time tracking and attendance software or app
- d. Specialist tools & equipment
- e. Branded attire (if applicable)

I. GATHER || Welcome them Aboard

- a. Schedule a team meet & greet.
- b. Personally give them a warm welcome as the CEO.
- c. Share with them some info about your company's values and history.
- d. Get them trained.

J. IMPRESS || Strut your Stuff

- a. People love to join companies that align with their values and beliefs.
- b. Keep reinforcing your culture, brand, and unique style.

K. BULLHORN || Spread the Word

- a. Announce your new hire via your professional community online platforms.
- b. Make them feel valued while showcasing your company's brand.

Pro Tips: The **Power of XYZ** is a resource for creating and managing online media posts for clients within this community. Custom template packages are also available to immediately elevate your professional presence online. As a member of the **Association of ESD Professionals**, you can send in your new hire announcement for sharing in their newsletter and on their website.

Stay front and center on **LinkedIn** by posting the news of your new hire along with a link to your website. Also, as part of the ESD community, contact Sheila Watson to get invited to the **Facebook ESD Sandbox Group** and make your announcement here as well. Be sure to include a photo!

L. ORIENTATION || Overview of organization and employee roles

- a. Give them an organization contact list and flow chart so they can see how everything works and who does what.

Pro Tip: Immediately share goals with new staff so they understand how their job responsibilities and goals are aligned with the overall business strategy. It will give them a stronger understanding of their impact and enable more informed decision-making within their first few months.

M. MILESTONES || A year-long guide to ensuring success for you and your new hire

a. Month one:

- i. Continue to provide regular feedback to your new hire.
- ii. Ask them for feedback.
- iii. Review past assignments, performance, and engagement.
- iv. Ensure they are getting any training they need.
- v. Schedule regular meetings to keep them engaged.

b. Month three:

- i. Schedule an informal performance review.
- ii. Review past and future assignments.
- iii. Set performance goals.
- iv. Give and ask for feedback.
- v. Check progress on their training.
- vi. Discuss the end of the probationary period (if relevant).

c. The 6-month mark:

- i. Conduct a six-month performance review.
- ii. Review the employee's goals and progress so far.
- iii. Set goals and objectives for the next 6 months.
- iv. Check that they have received all the necessary training.

d. 1 Year Review:

- i. Conduct a yearly performance review.
- ii. Recognize their first year at your organization.
- iii. Discuss goals, projects, and plans for the upcoming year.
- iv. Answer any questions and give/receive feedback.
- v. Discuss compensation and raise policies.

PRO TIP: Maintaining thorough employee notes and records will not only ensure good employee management, but it will protect you should you be faced with an involuntary parting of ways.

READY | REVIEW | REWARD | REPEAT
Design Decide Drive Duplicate
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