HIRING & TRAINING HAPPY, HIGH PERFORMERS

Best Practices Guide & Resources

LIMITLESS

Building a Hiring & Training Process

The decision to create a team instead of run your practice solo is a big (and exciting!) one, and a key part in creating leverage and maximizing efficiency as you grow. Remember, finding the perfect fit when it comes to your people will pave a path to a wildly successful business and a life that you love. Once committed to building your team, you'll realize you have several options. The first key decision you will need to evaluate is whether you will hire a new employee or outsource. If you choose to outsource, decide whether you would like to hire a firm (wider skillset, more people to work with) or an individual (can sometimes transition to employee); if you choose to insource, determine if you want your employee to be in-house, virtual, or a combination of the two.

Investing in happy, high-performers is one of the most effective ways to create scale and leverage. Yet, most firms rely on instinct and intuition when hiring and training. Gain confidence that you're hiring the right team member by creating systematic hiring and training program that evaluates for cultural fit, competence, commitment, contribution and a client-centric focus and gives new employees the training they need to reach their potential quickly.

CREATING AN OBJECTIVE HIRING PROCESS

An objective hiring process should look the same for every candidate, even the interview questions. This ensures an intentional process that gives you relevant comparisons across candidates to determine if a candidate has the competence, commitment, contribution, cultural fit and client-centric attitude to succeed in your firm.

8-STEP HIRING PROCESS

- WRITE AN EPIC AD
- PRE-SCREENING
- PHONE INTERVIEW
- 2ND SCREENING: PROFILING / SKILLS
- IN-PERSON INTERVIEW
- REFERENCES / BACKGROUND
- TEAM INTERVIEW
- YOU INTERVIEW

Hiring & Training Best Practices

OBJECTIVE EVALUATION OF CANDIDATES

As you move forward through each stage of your hiring process, the goal is to evaluate each candidate to ensure they have the knowledge, experience, attitude and aptitude to be successful in the role. You can use the Candidate Tracker and Top Candidate Comparison Form to take a more analytical approach to the evaluation, but additional best practices include evaluating the candidate based on the following:

CANDIDATE COMMUNICATES WELL: A well-written reply to pre-screening questions or thoughtful responses to interview questions are an important evaluation factor. If you don't feel 100% confident in a candidate's responses, it is an indication that they aren't a good fit.

CANDIDATE FOLLOWS DIRECTION: Did the candidate miss sending a PDF of their resume? Did they forget to complete one of the skills tests? If they missed instructions during the hiring process, it's a good indication they will miss them when less in on the line (i.e. after they're hired).

CANDIDATE EXPERIENCE FITS THE POSITION: demonstrate the competence and skill set that matches the needs of your position. The most important factor is to look for skills sets that are transferrable.

LOOK FOR THE "ROCK STAR" FACTOR: You can teach a bright person anything; you cannot teach a person to be bright. When looking for the "rock star" factor, responses tend to be above and beyond, thoughtful, logical, quick and candidates show enthusiasm for the work. This last part doesn't mean they are extroverts; it means you can tell they love what they do.

DON'T COMPROMISE: If you see a red flag, realize it's there for a reason. Don't let more than 1 red flag through to the next step. Don't hire red flags – period. Be 100% confident in your hire or don't hire.

The first step in landing a stellar employee or outsourced individual is to create an epic ad. See the Sample Job Posting resource for tips on writing one, along with several examples ranging from traditional to more edgy. After selecting which candidates you will interview, ensure successful and consistent candidate screening and interviewing by following the interview process and agendas outlined in the Interview Guide & Question Bank resource. Use tools such as the Candidate Tracker and Top Candidate Evaluation Form to ensure that you capture important details and create a consistent process for each applicant. Finally, customize the Sample Offer Letter to include the package you are extending to your new hire.

PREPARING FOR NEW EMPLOYEES

A new team member's onboarding experience and first 90 days will shape their ability to succeed in their new role in the long-term. While at some level "on the fly" training is a requirement in most businesses, you can significantly increase a new team member's ability to reach high performance sooner by implementing a formal training process.

HOW TO SET UP NEW EMPLOYEES:

1. Establish a process for onboarding using the New Employee Checklist
2. Build your training plan 1 week in advance of the start date using the Training Plan Template
3. Establish a schedule for the first week in the office
4. Ensure employee set-up is complete at least two days prior to the employee's start date

This process doesn't need to be extensive, but it should get them off on the right foot. Include training designed to reduce their learning curve and create common language and a communication model for success.

TRAINING PLAN & ONBOARDING TOOLS

Use the New Hire Training Announcement to welcome your new employee and introduce them to your clients. The New Employee Checklist will help ensure you have all necessary documents and meetings set for the successful completion of the employee's first week. You will want to set expectations, welcome the new employee to the firm and help them feel comfortable during this week by using the Training Overview, a simple PowerPoint that will explain their onboarding process.

Importantly, you will need to introduce them to their training plan, which will smoothly transition your new employee into the organization. The Training Plan Template will help you to establish a common language for your metrics for a job well done. Get used to defining training not as a yes/no checkbox, but on a skill level from introduced to master. A clear training plan will also serve as a forcing mechanism for you to allocate training time on your calendar not only during the first week, but throughout the first year. Touch base on a recurring basis with the Training Check-in Agenda. This agenda is ideally used 30, 60 and 90 days after hire to ensure training went well, summarize key successes and opportunities for professional development, and to set upcoming goals. This is a warm touch opportunity to empower your new hire to take ownership, as well as set and keep goals.

FINDING OUTSTANDING OUTSOURCING OPTIONS

Outsourcing can be an excellent alternative to hiring in-house. It can be a good fit when you have work that is repetitive and non-core, inconsistent or irregular, or simply when you need assistance with the hiring and managing of the assistant through a firm. Several benefits include that it can be a lower cost investment (no benefits, no overhead costs like internet or a workspace, no Social Security or Medicare taxes, and no paying for time when they are not busy) although the hourly rate tends to be higher. If you hire an independent contractor yourself, simply make sure they are contracted either hourly or by job and fill out the appropriate W-9 tax form. Best practices include a signed, written contract and tracking invoices.

The following process will help you find the ideal outsourced person:

DECIDE: Outsourcing may be a better fit for you than hiring an employee. You are making an investment either way—consider how much time and funding you have available, and align your choice with that.

CROWD SOURCE: You're not a thief, you're a collector of other people's research! There's no better way to find rock stars than to ask their fans. Check in with colleagues whose work you admire to see if they have recommendations for outsourced solutions or check out our Outsourcing Resource List.

INTERVIEW: Just as you would when hiring in-house, when outsourcing, be sure to do your due diligence. Talk with other advisers who are working with the outsourcing company you may select for their feedback prior to committing. When interviewing an outsourced individual or firm, ask questions like:

1. How do you manage and track your time? How do you keep on task?
2. What makes your company different from other outsourcing options?
3. How long have you been providing your services?
4. Do you have client testimonials?
5. How long would it take you to become familiar with my firm? To completely take over my function?

HIRE: This is your leap of faith. Make a choice and commit to a time period. Be thorough in making sure the terms of your agreement are well explained and documented, and then go!

INTEGRATE: Don't expect everything to be smooth sailing from the start. Outsourcing talent truly is an extension of your firm, so you need to be preparing to share your systems, learn theirs and work collaboratively.

COMMUNICATE: When you run into issues, commit to communication first. Allow for relationships and trust to build gradually based on open feedback.

Whether you decide to bring a new employee into your organization or outsource, following a smooth hiring and training process will ensure that both you and your employee set a standard for open communication and a clear path toward progress.

Hiring & Training Resources

The below are the available samples you can customize to finalize your hiring and training processes. Editable versions are available in word®.

LIMITLESS PROVIDED SAMPLES	ITEMS YOU WILL NEED TO PROVIDE
JOB POSTING & DESCRIPTION	
1. Sample Job Posting	
SCREENING TOOLS	
2. Candidate Tracker & Top Candidate Comparison 3. Interview Guide & Question Bank	1. Background, Reference Check authorizations 2. Personal Profiles (ex. Kolbe, DISC) 3. Skills testing (ex. Totaltesting.com) 4. Case Studies by Position
OFFER DOCUMENTATION	
4. Sample Offer Letter	1. Employment Agreements (NDA, Non-Compete, etc.)
NEW HIRE ONBOARDING & TRAINING	
5. New Hire Announcement 6. Training Overview 7. New Employee Checklist 8. Training Plan Template 9. Training Check-In Agenda	1. Employment Verification and Forms