



THE BEGINNER'S FIRST HIRE GUIDE

WHEN SHOULD I HIRE SOMEONE,
AND HOW DO I GET IT RIGHT?

DECIDE > DEFINE > HIRE > TRAIN

DON'T JUST HIRE HELP. BUILD THE RIGHT ROLE.



WELCOME

When business gets busy, hiring can sound like the obvious next step. But a new employee or contractor also brings costs, training, communication, and responsibility.

The first question is not 'Who should I hire?' It is 'What problem am I trying to solve?' Sometimes the answer is a better process, an automation, or a specialist for a short project.

This guide helps you decide with numbers, define a role, compare candidates fairly, and plan their first month. The worksheets can be completed and saved on a computer.

YOUR STARTING POINT

MY BUSINESS

THE WORK I NEED HELP WITH

A GOOD FIRST HIRE SOLVES A SPECIFIC PROBLEM.



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STEP 1

DO YOU NEED TO HIRE?

Start with the constraint, not a job title. Hiring is one of several ways to solve a business problem.

TOO MUCH WORK

Customer demand exceeds your available time.

BROKEN PROCESS

Repeated tasks are unclear or inefficient.

MISSING SKILL

A specialist could improve an important result.

REPEATABLE DEMAND

There is reliable work for another person.

THE EXACT PROBLEM I WANT TO SOLVE

EVIDENCE IT HAPPENS REGULARLY

WHAT I COULD SIMPLIFY OR AUTOMATE FIRST

WHAT MUST IMPROVE IF I HIRE



STEP 2

FIND WORK TO DELEGATE

List repeated tasks and choose work that another person could perform with clear instructions.

- | | |
|---|--|
| ☐ Answer inquiries | ☐ Schedule jobs |
| ☐ Fulfill orders | ☐ Prepare materials |
| ☐ Bookkeeping support | ☐ Customer follow-up |
| ☐ Social media posting | ☐ Inventory checks |
| ☐ Packing and shipping | ☐ Quality checks |
| ☐ Research | ☐ Administrative work |

HOURS PER WEEK SPENT ON THESE TASKS

ESTIMATED VALUE OF MY TIME PER HOUR

TOP THREE TASKS TO HAND OVER

TASKS I SHOULD CONTINUE DOING



STEP 3

CAN YOU AFFORD THE ROLE?

Calculate the full monthly cost, not just the hourly wage or quoted contract rate.

HOURS PER WEEK

HOURLY PAY OR CONTRACT RATE

ESTIMATED MONTHLY PAY: HOURS X RATE X 4.33

PAYROLL TAXES, BENEFITS, FEES, TOOLS AND OTHER COSTS

TOTAL ESTIMATED MONTHLY COST

EXPECTED ADDITIONAL GROSS PROFIT OR SAVINGS

DECISION CHECK: Compare total cost against available cash, expected benefits and how long you can sustain the role if sales ~~don't~~ **could fund the role without extra sales**



STEP 4

EMPLOYEE OR CONTRACTOR?

The correct classification depends on the actual working relationship and applicable law.

EMPLOYEE

May be appropriate when the business directs ongoing work and how it is performed.

CONTRACTOR

May fit an independent provider delivering a defined service.

IMPORTANT: Classification is determined by law, not the label in a contract. Check federal, state and local rules and seek qualified guidance.

☐ Ongoing daily work

☐ Project with a defined deliverable

☐ Business sets the schedule

☐ Provider controls the method

☐ Work is central to the business

☐ Provider has other clients

RELATIONSHIP TO INVESTIGATE

QUESTIONS TO CONFIRM WITH A PROFESSIONAL



STEP 5

DEFINE THE ROLE

Describe measurable results, rather than asking someone to help with everything.

ROLE TITLE

MAIN RESULT THIS PERSON WILL OWN

RESPONSIBILITY 1

RESPONSIBILITY 2

RESPONSIBILITY 3

RESPONSIBILITY 4

HOW I WILL MEASURE SUCCESS



STEP 6

WRITE THE JOB DESCRIPTION

Make expectations clear, realistic and relevant to the job.

ROLE TITLE

WHY THE ROLE EXISTS

KEY RESPONSIBILITIES

REQUIRED SKILLS AND EXPERIENCE

SCHEDULE, LOCATION AND WORKING ARRANGEMENT

PAY RANGE OR PROJECT BUDGET



STEP 7

FIND CANDIDATES

Choose sourcing channels that fit the work and make applying straightforward.

☐ Employee referrals

☐ Local networks

☐ Industry communities

☐ Job boards

☐ Trade schools

☐ Specialist marketplaces

☐ Professional associations

☐ Your website

MY TWO BEST SOURCING CHANNELS

INFORMATION I WILL ASK CANDIDATES TO PROVIDE

APPLICATION DEADLINE

WHO WILL REVIEW APPLICATIONS?



STEP 8

INTERVIEW FOR EVIDENCE

Ask each candidate the same job-related questions and look for specific examples.

01 Tell me about a similar task you completed.

NOTES AND EVIDENCE

02 What did you do when something went wrong?

NOTES AND EVIDENCE

03 How would you prioritize two urgent requests?

NOTES AND EVIDENCE

04 How would you handle a typical customer situation?

NOTES AND EVIDENCE

05 What would you need to succeed in this role?

NOTES AND EVIDENCE

A JOB-RELATED WORK SAMPLE I COULD USE



STEP 9

COMPARE CANDIDATES

Use consistent job-related criteria rather than relying on first impressions.

CRITERION	CANDIDATE A SCORE 1-5	CANDIDATE B SCORE 1-5
Relevant skills		
Work sample quality		
Communication		
Follow-through		
Problem solving		
Availability		

BEST EVIDENCE FOR MY PREFERRED CANDIDATE



STEP 10

REFERENCES AND OFFER

Verify job-related details and set clear expectations before work begins.

☐ Verify relevant work history

☐ Ask job-related reference questions

☐ Confirm availability

☐ Document pay and responsibilities

☐ Confirm classification and paperwork

☐ Set a start date

☐ Prepare access and equipment

☐ Explain the first-week plan

PREFERRED CANDIDATE

PROPOSED START DATE

PROPOSED PAY OR PROJECT RATE

CHECKS AND DOCUMENTS STILL NEEDED



STEP 11

30-DAY ONBOARDING PLAN

Training is part of the cost of hiring. Define expectations for the first month.

WEEK 1

Access, expectations, safety, introductions and observation.

WEEKLY TASKS AND MILESTONES

WEEK 2

Guided practice on the most important tasks.

WEEKLY TASKS AND MILESTONES

WEEK 3

More independent work with regular quality checks.

WEEKLY TASKS AND MILESTONES

WEEK 4

Review results, gaps, feedback and next responsibilities.

WEEKLY TASKS AND MILESTONES

HOW I WILL EVALUATE THE FIRST 30 DAYS



STEP 12

HIRING READINESS CHECK

Complete this seven-day challenge and score your readiness.

- | | | |
|--------------|--|-------------------------------|
| DAY 1 | Identify the business problem | ☐ Done |
| DAY 2 | List tasks and weekly hours | ☐ Done |
| DAY 3 | Estimate the full monthly cost | ☐ Done |
| DAY 4 | Check classification rules | ☐ Done |
| DAY 5 | Write the role and job description | ☐ Done |
| DAY 6 | Prepare consistent interview questions | ☐ Done |
| DAY 7 | Build an onboarding checklist | ☐ Done |

SCORE EACH AREA FROM 1 (NOT READY) TO 5 (READY)

I KNOW WHAT PROBLEM HIRING SOLVES (1-5)

I CAN SUPPORT THE FULL COST (1-5)

I DEFINED THE ROLE AND TRAINING (1-5)

I CAN EVALUATE CANDIDATES FAIRLY (1-5)



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YOUR 30-DAY HIRING ACTION PLAN

DECIDE CAREFULLY. HIRE FOR A REAL NEED.

THE BUSINESS PROBLEM I NEED TO SOLVE

WHAT I WILL SIMPLIFY OR TEST FIRST

MY SUSTAINABLE MONTHLY BUDGET

THE ROLE OR PROJECT I NEED

THE RESULTS I WILL EXPECT

WHERE I WILL FIND CANDIDATES

WHAT THE FIRST 30 DAYS WILL LOOK LIKE

HIRE SMART. BUILD BIGGER.

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PLAN. VALIDATE. BUILD. GROW.

