



WYHR

WHO'S YOUR HR?

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# Hiring & Onboarding Employees

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# Overview

Hiring new employees to an organization can be a tricky undertaking. Properly onboarding new employees once they have been hired is the key to their long-term success. And paying them sufficiently and compliantly will help promote employee retention as well as mitigate risk for the organization. Let's learn the in's and out's of successfully hiring, managing and paying employees by covering the following topics.

Workforce Planning

Recruitment

Performance Management

Termination

Payroll



Timing



Type



Classification

# Workforce Planning

Preparing to hire



# Workforce Planning

## When is it time to hire?

- Running out of time to get everything done
- Your time is better spent working on the business, not in it
- Financially able
- Ready to handle additional burden, administration and risk
- Skill set or expertise needs added



# Workforce Planning

## Should I hire a 1099 contractor or W-2 employee?

- Determination made by *meaning of the employment relationship*, not how you pay them
  - Although there are tax implications for each (1099 vs W2)
- Significant factors include but are not limited to:
  - The extent to which the services rendered are an integral part of the principal's business
  - The permanency of the relationship
  - The amount of the alleged contractor's investment in facilities and equipment
  - The nature and degree of control by the principal
  - The alleged contractor's opportunities for profit and loss
  - The amount of initiative, judgment, or foresight in open market competition with others required for the success of the claimed independent contractor
  - The degree of independent business organization and operation
- DOL Wage and Hour Division provides additional guidance



# Workforce Planning

## What is the proper classification for the position?

- Exempt vs Non-exempt
  - Determined by the salary basis test and duties, not whether you pay them salary or hourly
    - Minimum salary level \$684/week or \$35,568/year
    - Exemptions for bona fide executive, administrative, professional, outside sales employees and certain computer employees
  - Determines eligibility for overtime compensation and minimum wage
  - Covered employers / employees according to eligibility defined by [FLSA](#)
    - Business engaged in interstate commerce
    - Annual gross volume of sales at least \$500k
    - Hospitals, schools, public agency



Define Job Requirements



Sourcing & Shortlisting  
Candidates



Interview Process



Job Offer & Onboarding

# Recruitment Process

**Create a robust hiring  
process to drive  
success**



# Understanding Job Requirements

## What are absolute requirements to achieve success?

- Non-negotiables
  - Education? (Ex. College degree)
  - Experience? (Ex. At least 5 years of IT experience)
  - Software? (Ex. At least 2 years of working experience with JavaScript and Python)
  - Behaviors? (Ex. Leadership, communication)

## What is a plus but not a must?

- Optional skills, experience or traits
  - Certification (Ex. Project Management Professional (PMP) Certification is preferred)
  - Education (Ex. Master's degree is preferred)
  - Software (Ex. Working experience with Oracle Cloud Platform is preferred)

## What are day-to-day responsibilities?

- Tasks and functions of role
  - 75% of their time



# Sourcing & Shortlisting Candidates

## Sourcing Process

- Craft job description based on job requirements
- Set compensation range (budget/comp philosophy)
- Create job posting – marketing material
- Determine how you will track resumes and hiring decisions (Applicant tracking system, manually)
- Determine where to advertise the job
  - Job boards (Ex. Indeed, LinkedIn, Facebook, Craigslist, etc.)
  - Website
  - Newspaper
  - Local trade schools/colleges/universities
  - State workforce agency
  - Radio/TV ads
  - Signage
- Alternative sources
  - Employee referral program
  - Recommendations from trusted sources
  - Engage a staffing firm or recruiter

## Shortlisting Candidates

- Review resumes received
  - Weed out unqualified candidates
  - Narrow down top candidates (Ex. 8-10 candidates)
  - Consider assessments and toll gates (work examples, references, application steps) to further narrow list



# Interview Process

## Standard Interview Process

- Create behavior-based questions relevant to job duties
  - *Past behavior is the best predictor of future behavior*
- Know what you can and can't legally ask candidates (work related)
- Develop a template with standardized questions to compare apples to apples
  - Follow-up questions are allowed
- 15 to 30-minute pre-screen interview with top candidates (phone or virtual to save time)
- Conduct in-person interviews (or virtual) with finalists
- During each interview, take written notes and use a scoring rubric to make objective unbiased hiring decision
- Be prepared to answer the candidate's questions
- Advise candidates of the next steps and be sure to follow-up



# Job Offer & Onboarding

## Extending a Job Offer

- Determine offer contingencies (background investigation, pre-employment drug screen, fitness for duty, motor vehicle records check, etc.)
- Present job offer verbally – this is exciting!!!!
- Follow-up with written offer
- Coordinate contingencies
- Set start date, time & location
- Communicate first day expectations to employee
  - Proper identification documents for I9
  - What to bring/not to bring with them (tools, equipment, uniforms, PPE, etc.)
  - Agenda for day
  - Parking, lunch, and other miscellaneous details

## Onboarding

- New hire paperwork
  - I-9s, W4, emergency contact, banking info, etc.
- New hire orientation using new hire checklist
  - Mission, vision, values
  - Employee handbook or policies/procedures
  - Computer login information
  - Benefits enrollment (if applicable)
- Establish training schedule/onboarding plan to learn job with specific measurable goals
- Conduct regular feedback session to monitor performance and progress to onboarding plan



Set goals



Establish metrics



Review performance



Address concerns

# Performance Management

**Inspect what you  
expect**



# Managing Performance

## Goal Setting

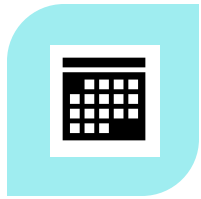
- Establish key performance indicators with metrics
- Monitor progress
- Create regular feedback loop
  - Allow for course corrections
  - Engage employee in problem solving
- Modify/tweak as necessary
- Recognize and reward positive behavior/results
  - Intrinsic and extrinsic
  - Know what motivates the employee

## Addressing Gaps

- Skill or will?
  - Assess skill gaps and implement solutions such as training, coaching and mentoring
  - Address will gaps through corrective actions and discipline
    - Poor performance
    - Poor attendance
    - Poor attitude
- Document, document, document
  - Supervisor notes
  - Write-ups
  - Last chance agreements
  - Suspensions
  - Performance improvement plans



**REVIEW  
DOCUMENTATION  
AND DETERMINE  
RISK**



**COORDINATE  
TERMINATION  
MEETING**



**COLLECT COMPANY  
PROPERTY AND  
REVOKE ACCESS TO  
SYSTEMS**



**ISSUE LAST  
PAYCHECK**

# Termination Process



**UPDATE  
PAYROLL/HRIS  
SYSTEM**



**TALK TO REMAINING  
EMPLOYEES**



**RESPOND TO  
UNEMPLOYMENT  
CLAIMS**

# Firing

## What NOT to do

1. Don't fire an employee without a face-to-face meeting (if possible)
2. Don't act without a warning
3. Don't start the conversation without a witness
4. Don't give them impression the decision isn't final
5. Don't apologize to them
6. Don't let them leave with company property
7. Don't let the employee access information systems
8. Don't allow employee to return to their work area after being fired
9. Don't be disrespectful or rude
10. Don't end the meeting without exchanging contact information





System



Set up



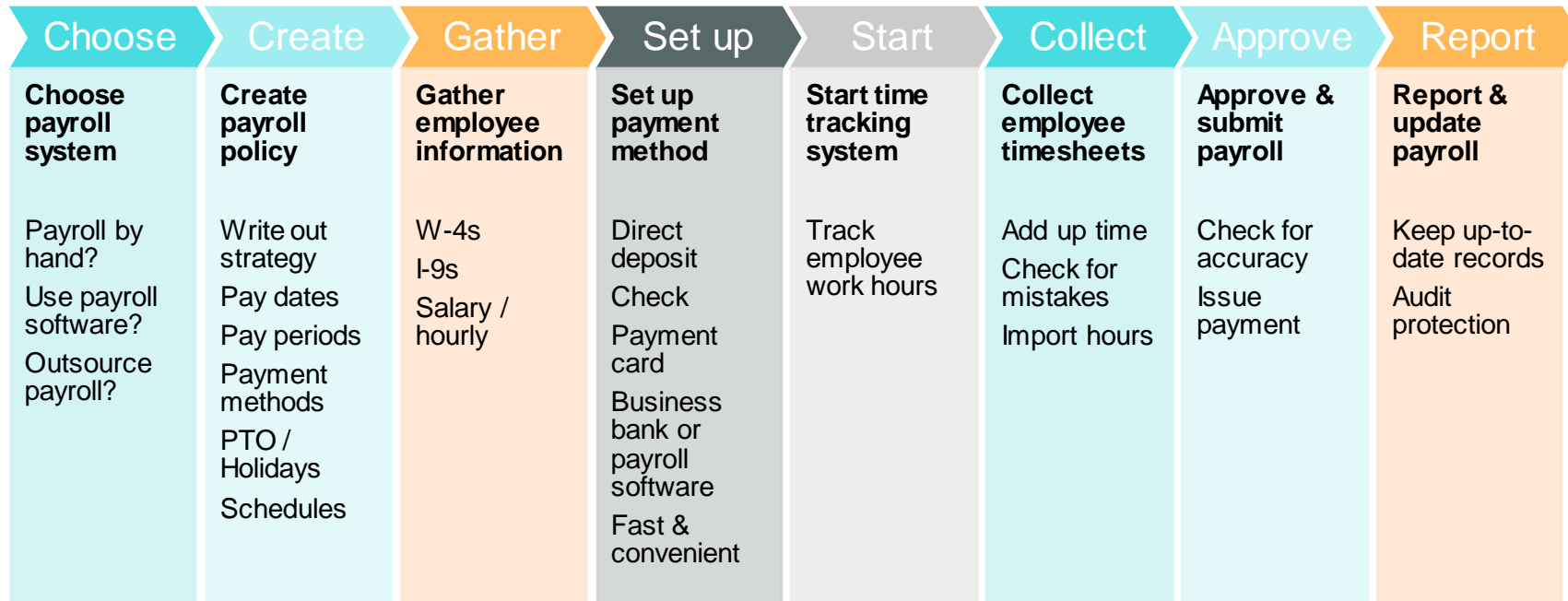
Implementation



Audit readiness

# Payroll Process

**Compensation and  
Compliance**



# Payroll

# Our Team

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