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BizGrowth Academy

## HR 101 FOUNDATION

Lesson 5: Getting Started — Your First 3 HR Actions

### PART 2 OF 2

*Building Momentum — Actions 2 & 3 + Your Implementation Path*

Module Information	Details
Duration	~7 minutes reading time
Focus	Actions 2-3, Implementation Path, Commitment, Next Steps
Prerequisites	HR 101 Lessons 1-4, Part 1 of Lesson 5
Downloadable Tools	3 templates + 1 planner + 1 certificate

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## Part 2: Building Momentum

Quick Recap from Part 1:

- You learned the 7-step hiring process that prevents \$30K-\$100K mistakes
- You saw how to write clear job descriptions and conduct structured interviews
- You have the framework for objective candidate scoring

Now let's complete your HR foundation with **Actions 2 and 3**, then map out exactly how you'll implement these this week.

## Action 2: Create Your Onboarding Checklist

*Transform chaotic first days into structured new hire success.*

### The Problem: How Most Small Businesses Onboard

*"Okay, you're hired! See you Monday. Just show up at 9. We'll figure it out."*

*— Sound familiar?*

**Here's what actually happens on Day 1 without a system:**

Day 1 Reality	What It Costs You
New hire sits around waiting	Payroll dollars wasted
No computer login ready	Productivity delayed by days
No one knows who's training them	Confusion, frustration
No clear expectations for Week 1	New hire wonders "Am I doing okay?"
Manager too busy to check in	Problems go unnoticed until they're big

**The result:** New hires take 2-3x longer to get productive. Many leave within 6 months because they "never felt set up for success."

## The Solution: A Simple Onboarding Checklist

Research shows companies with structured onboarding see:

- 82% higher retention
- 70% higher productivity
- New hires productive 2-3 weeks faster

**You don't need a fancy program.** You need a checklist that ensures nothing falls through the cracks.

## The 5-Stage Onboarding Framework

Stage	When	Focus	Who's Responsible
Pre-boarding	Offer → Day 1	Logistics ready	Owner/Manager
Day 1	First day	Welcome + setup	Owner/Manager + Team
Week 1	Days 1-5	Role clarity	Owner/Manager
Month 1	Days 1-30	Building competence	Owner/Manager
Day 60/90	Checkpoints	Progress review	Owner/Manager

### Stage 1: Pre-Boarding (Between Offer and Day 1)

**Goal:** Everything is READY before they walk in the door.

- Computer/laptop ready — Configured, logged in, software installed (2-3 days before start)
- Email account created — First.Last@company.com active (2-3 days before start)
- Desk/workspace set up — Clean, supplies ready, chair adjusted (Day before start)

- Welcome email sent — Start time, parking, what to bring, who to ask for (1-2 days before start)
- Team notified — "Jane starts Monday — please welcome her!" (1-2 days before start)
- First-day schedule set — Hour-by-hour plan for Day 1 (1-2 days before start)

## Stage 2: Day 1

**Goal:** New hire feels WELCOME and ORIENTED.

- Personal greeting — Owner/Manager meets them at the door (First 5 minutes)
- Workspace tour — Show them around, introduce the team (First 30 minutes)
- Tech setup confirmed — Make sure everything works (First hour)
- Paperwork completed — I-9, W-4, handbook acknowledgment (First 1-2 hours)
- Lunch with manager/team — Don't let them eat alone on Day 1 (Midday)
- Role overview discussion — "Here's what you'll be doing and why it matters" (Afternoon)
- End-of-day check-in — "How was your first day? Any questions?" (Last 15 minutes)

## Stage 3: Week 1 (Days 1-5)

**Goal:** New hire understands WHAT they're doing and HOW to do it.

- Job description review — Walk through responsibilities together (Day 1-2)
- Key systems training — Show them the tools they'll use daily (Days 1-3)
- First small tasks assigned — Give them something real to do (Day 2-3)
- Daily check-ins — 10-15 minutes: "What's working? What's confusing?" (Daily)
- Key contacts introduced — "Here's who to go to for X, Y, Z" (Throughout week)
- Week 1 feedback session — "Here's what's going well. Here's what to focus on." (Day 5)

## Stage 4: Month 1 (Days 1-30)

**Goal:** New hire is BUILDING COMPETENCE and contributing value.

- Weekly check-ins continue — 15-30 minutes weekly with manager
- Increasing responsibility — More complex tasks as they prove capability
- Feedback loops established — Regular input on what's working/what's not
- 30-day check-in conversation — Formal discussion: "How's it going? What do you need?"
- Goals for Month 2 set — "Here's what we want you to focus on next month"

## Stage 5: Day 60 and Day 90 Checkpoints

**Goal:** Confirm FIT and ADDRESS any issues early.

### Day 60 Check-In Questions:

- "What's going well in your role?"
- "What's been harder than expected?"
- "Is there anything you need that you don't have?"
- "Do you have any concerns about your role or the team?"
- "Is this what you expected when you accepted the offer?"

### Day 90 Check-In Questions:

- "Do you feel like you're up to speed? If not, what's missing?"
- "What would make this job better for you?"
- "Where do you want to grow?"
- "Are there any changes we should make?"
- "From your perspective, is this a good fit? Are we a good fit for you?"

## Action 2 Summary: What You'll Create

Document	What It Does	Pages
Pre-Boarding Checklist	Everything ready before Day 1	1 page
Day 1 Schedule Template	Hour-by-hour first day plan	1 page
30-60-90 Day Milestones	What success looks like at each stage	1 page
Check-In Question Bank	Questions for Day 30, 60, 90 conversations	1 page

Total setup time: 30-45 minutes

Template available: 30-60-90 Day Onboarding Checklist (available in BizHealth.ai platform)

## Before vs. After: Onboarding

Before (Ad-Hoc)	After (Structured Checklist)
"Just show up Monday"	Welcome email with clear instructions
No computer ready	Tech set up before they arrive
"Figure it out as you go"	Week 1 training plan with clear milestones
No check-ins	Daily (Week 1), Weekly (Month 1), Formal (30/60/90)
Find out there's a problem at Month 6	Catch and fix issues at Day 30
Result: 3-4 month ramp time	Result: 2-3 weeks faster productivity

## Action 3: Draft Your Employee Handbook Outline

*Establish basic legal protection and clear expectations.*

### The Problem: Why You Need a Handbook

*"We're too small for a handbook. We just talk through things as they come up."*

*— Famous last words before an employment lawsuit*

**Here's the reality of operating without a handbook:**

Risk	What Could Happen	Cost
No at-will statement	Employee claims they can't be fired without cause	Legal fees + settlement
No harassment policy	Employee claims they weren't told harassment was prohibited	Legal fees + liability
No PTO policy	Employee claims they were promised unlimited vacation	Payout + resentment
No disciplinary process	Employee claims termination was unfair/discriminatory	Legal fees + back pay

A simple handbook protects YOU.

It doesn't have to be 50 pages. Even a 10-page handbook is dramatically better than nothing.

## The 7 Must-Have Sections

### Section 1: Welcome & Company Overview (1 page)

Include	Purpose
Company mission/values	Sets the tone
Brief company history	Builds connection
What makes you different	Culture introduction

### Section 2: At-Will Employment Statement (½ page)

**Why it matters:** This is your most important legal protection. It establishes that employment can be ended by either party at any time, for any legal reason.

Sample language (customize with legal review):

"Employment with [Company Name] is at-will. This means that either you or the company may end the employment relationship at any time, with or without cause or notice. Nothing in this handbook or any other company document creates a contract of employment or guarantees employment for any specific period."

### Section 3: Anti-Discrimination & Harassment Policies (1-2 pages)

**Why it matters:** Required by law. Demonstrates that you take these issues seriously.

#### Include:

- Statement that discrimination based on protected classes is prohibited
- Definition of harassment (including sexual harassment)
- How to report concerns
- Statement that retaliation is prohibited

- Who to contact (specific name/role)

## Section 4: Time Off Policies (1-2 pages)

**Why it matters:** Prevents disputes about PTO, sick time, holidays.

**Include:**

- Paid time off (how much, how it's earned, how to request)
- Sick leave (separate from PTO or combined)
- Holidays observed
- Other leave (bereavement, jury duty, military)
- Unpaid leave policy

## Section 5: Compensation & Benefits Basics (1 page)

**Why it matters:** Sets clear expectations about pay.

**Include:**

- Pay schedule (weekly, bi-weekly, monthly)
- How pay is delivered (direct deposit, check)
- Overtime policy (if applicable)
- Benefits overview (health insurance, 401k, etc.)
- Expense reimbursement policy

## Section 6: Conduct & Disciplinary Process (1-2 pages)

**Why it matters:** Establishes standards and gives you a process to follow.

**Include:**

- Expected conduct standards
- Prohibited conduct (examples)

- Disciplinary process (verbal warning → written warning → termination, or similar)
- Statement that the company reserves the right to skip steps for serious violations

## Section 7: Acknowledgment Form (1 page)

**Why it matters:** Documents that the employee received and reviewed the handbook.

**Include:**

- Statement that employee received the handbook
- Statement that employee will read and follow the policies
- Statement that the handbook is not a contract
- Signature line and date

## Nice-to-Have Policies

Once you have the 7 must-haves, consider adding:

Policy	Why It's Good to Have
Flexible work/remote work	Clarifies expectations for hybrid/remote
Professional development	Shows investment in employees
Recognition programs	Builds culture
Social media guidelines	Protects company reputation
Confidentiality	Protects sensitive information

## Action 3 Summary: What You'll Create

Document	What It Does	Pages
Handbook Outline	7-section structure with subsections	1 page
Sample Language Guide	Example text for each section	3-4 pages
Acknowledgment Form	Signature page for employees	1 page

Total setup time: 45-60 minutes to draft the outline

Template available: Employee Handbook Outline Template (available in BizHealth.ai platform)

Important Note: Have an employment attorney or HR professional review your handbook before using it. Templates are a starting point, not legal advice.

## Before vs. After: Handbook

Before (No Handbook)	After (Basic Handbook)
"We don't have anything in writing"	Clear policies documented
Disputes about "what was promised"	Written reference for everyone
Liability if harassment occurs	Documented policy + reporting process
Unclear about PTO, pay, expectations	All in one place
Result: Significant legal exposure	Result: Basic legal protection

# Your Implementation Path

*Turn knowledge into action with a clear, doable plan.*

## Two Implementation Options

**Choose the path that fits your reality:**

### OPTION A: FAST TRACK (1 Week)

**For:** Owners who want quick wins NOW

Day	Action	Time
Day 1-2	Complete Action 1 (Hiring Process)	30-60 min
Day 3-4	Complete Action 2 (Onboarding Checklist)	30-45 min
Day 5-7	Complete Action 3 (Handbook Outline)	45-60 min

**Total time:** ~2 hours spread across 1 week

### OPTION B: STEADY BUILD (3 Weeks)

**For:** Owners who want to be more thorough

Week	Focus	Actions
Week 1	Hiring	Complete Action 1, test with a real or hypothetical role
Week 2	Onboarding	Complete Action 2, walk through it mentally with your last hire
Week 3	Handbook	Complete Action 3, have someone else read it for clarity

**Total time:** ~2 hours spread across 3 weeks

## Whichever Path You Choose: Start with ONE

If you can only do ONE thing this week, do this:

Start with whatever your NEXT people action is.

If Your Next Action Is...	Start Here
Hiring someone	Action 1: Hiring Process
Bringing on a new hire	Action 2: Onboarding Checklist
Protecting yourself legally	Action 3: Handbook Outline
Not sure	Action 1: Hiring Process (most ROI)

## Your Action Commitment Tool

*Create accountability that drives follow-through.*

### The Commitment Framework

Research shows that people who write down their commitments and share them with someone else are dramatically more likely to follow through.

Here's your commitment tool:

#### MY HR QUICK-START COMMITMENT

##### PART A: What I'm Committing To

- Action 1: Document my hiring process
- Action 2: Create my onboarding checklist
- Action 3: Draft my employee handbook outline
- Other: \_\_\_\_\_

**PART B: When I'll Complete It**

I will complete my chosen action by: \_\_\_\_\_ (date)

**PART C: Who I'll Share It With**

I will share my completed work with: \_\_\_\_\_ (name)

By this date: \_\_\_\_\_ (date)

**PART D: My Signature**

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## Why This Works

Element	Why It Matters
Writing it down	Makes it concrete (not just "I should do this someday")
Setting a date	Creates urgency and a finish line
Naming a person	Adds social accountability
Sharing the work	Gives you feedback and support

Pro tip: Your accountability partner could be:

- A business partner or co-founder
- A mentor or advisor
- A fellow business owner
- A trusted employee
- A BizGuides coach

# Congratulations — You've Completed HR 101!

## You now have:

- ✓ **A clear understanding of what HR really is** (talent optimization, not bureaucracy)
- ✓ **The financial case for systematic HR** (preventing \$50K+ mistakes)
- ✓ **Your HR maturity level** (and what it means)
- ✓ **A stage-appropriate roadmap** (what to build and when)
- ✓ **Three actionable first steps** (with templates to implement them)

This is a real foundation.

Most business owners never get this far.

## Your Recommended Next Step

Based on your earlier answers in HR 101, here's where to go next:

If Your Situation Is...	Your Recommended Path
0-3 years, 1-10 employees	Start-Up Journey (12 weeks): Build foundational HR systems
3-10 years, 10-50 employees	Scaling Journey (16 weeks): Develop managers + performance systems
10+ years, 50-150 employees	Established Journey (16 weeks): Succession + optimization
150+ employees or pre-exit	Enterprise Journey (14 weeks): Due diligence + strategic HR

*Not sure which journey fits? Take the full BizHealth HR & Talent Assessment for personalized recommendations.*

## Additional Support Options

Need	Resource	Where to Find It
Templates & Tools	BizTools HR Bundle	BizHealth.ai Platform
1:1 Coaching	BizGuides HR Session	BizHealth.ai Platform
Manager Training	BizLeaDeR Programs	BizHealth.ai Platform
Full Assessment	BizHealth HR & Talent Assessment	BizHealth.ai Platform

## One Final Thought

**You're not behind. You're building.**

Every business owner starts somewhere. The fact that you completed HR 101 puts you ahead of most.

Now it's time to take action.

**Pick one action. Set a deadline. Tell someone. Start this week.**

## Lesson 5 Downloads

All templates referenced in this lesson:

Template	Purpose	Format
Hiring Process Template	JD framework, questions, scorecard, references, offer letter	Word/PDF (3 pages)
30-60-90 Day Onboarding Checklist	Pre-boarding through 90-day checkpoints	PDF + Sheet (2 pages)
Employee Handbook Outline Template	7 core sections + sample language + acknowledgment form	Word (4-5 pages)
Quick-Start HR Implementation Planner	1-week and 3-week implementation plans	Fillable PDF (1 page)
HR 101 Completion Certificate	Recognition of completion (optional)	PDF (1 page)

All templates are available in the [BizHealth.ai platform](#).



*Stop Guessing. Start Growing.*

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