



BizHealth.ai

HR 101 FOUNDATION

LESSON 5

Getting Started: Your First 3 HR Actions

PART 1 OF 2

From Overwhelm to Your First Action

Duration:	~8 minutes reading time
Part 1 Focus:	Introduction, Why These Three Actions, Action 1 (Hiring Process)
Learning Objective:	Understand the first foundational HR action and have the tools to implement it

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Section 1.1: From Overwhelm to Action

You don't need to build a full HR department.

You just need to start with the first high-leverage moves.

The Reality Check

If you've made it through Lessons 1-4, you now know:

- ✓ HR is really about talent optimization, not bureaucracy
- ✓ The real cost of bad hires and turnover (it's probably more than you thought)
- ✓ Your current HR maturity level
- ✓ What stage your business is in and what to focus on

But here's what might be running through your head right now:

"Okay, I get it. HR matters. But where do I actually START? There's so much I could do..."

Good news: You don't need to do it all. Not today. Not this month. Not even this year.

You just need to start with **three foundational actions** that will:

- Prevent the biggest, most expensive mistakes
- Take less than 2 hours total to set up
- Work for ANY business, regardless of size or industry

Why THESE Three Actions?

We chose these three specific actions based on:

Criteria	Why It Matters
Highest Impact	These prevent the \$30K-\$100K mistakes we talked about in Lesson 2
Easiest to Implement	No special skills, software, or budget required
Quick Wins	You can complete each one in 30-60 minutes
Foundation for Everything Else	Every other HR system builds on these

The Three Actions Overview

Here's what you'll walk away with today:

Action	What You'll Create	Time to Complete	Impact
Action 1	Documented Hiring Process	30-60 minutes	Prevents bad hires
Action 2	Onboarding Checklist	30-45 minutes	Gets new hires productive faster
Action 3	Employee Handbook Outline	45-60 minutes	Protects you legally

Let's dive into the first one — this is where most money is lost or saved.

Section 1.2: Action 1 — Document Your Hiring Process

Purpose: Transform ad-hoc hiring into a repeatable, consistent system

The Problem: How Most Small Businesses Hire

Sound familiar?

"I need someone fast. I'll post on Indeed, see who applies, interview a few people, and pick whoever seems best."

Here's what's actually happening:

What You Think	What's Really Happening
"I'm a good judge of character"	You're relying on gut feelings that are often wrong
"The interview went great"	You talked for 45 minutes about nothing measurable
"They seemed perfect"	You hired someone who interviews well, not works well
"I'll train them up"	You're spending months fixing what should have been screened out

The result: 50-200% of annual salary lost on a bad hire (that's **\$30K-\$100K** for a typical role).

The Solution: A Simple, Repeatable Hiring Process

A documented hiring process means you do the same thing every time — so you get consistent results instead of random outcomes.

It doesn't need to be complicated. Here are the 7 steps:

STEP 1: Write a Clear Job Description

Before: *"We need someone to help with stuff."*

After: A one-page document that includes:

Section	What to Include	Example
Job Title	Clear, searchable title	"Administrative Assistant" (not "Office Ninja")
What They'll DO	3-5 key responsibilities	"Manage scheduling, answer phones, process invoices"
Must-Haves	Non-negotiable requirements	"2+ years admin experience, proficient in Excel"
Nice-to-Haves	Bonus qualifications	"Experience with QuickBooks"
Compensation Range	Salary or hourly range	"\$45,000-\$55,000/year"

Time to complete: 15-20 minutes

Pro Tip: Focus on what they'll DO, not who they ARE. "Manages scheduling for 3 executives" is better than "detail-oriented self-starter."

STEP 2: Choose 3-5 Sourcing Channels

Don't post everywhere. Pick 3-5 places where YOUR ideal candidates actually look:

Channel	Best For	Cost
Indeed	Most roles, especially entry-level to mid-level	Free posting, paid sponsorship optional
LinkedIn	Professional and management roles	Free posting, paid sponsorship optional
Employee Referrals	All roles (often highest quality)	Consider a referral bonus (\$250-\$500)
Industry Job Boards	Specialized roles	Varies by industry
Local Networks	Community-based businesses	Often free

Your decision: List YOUR top 3-5 channels on the template.

STEP 3: Screen Resumes Against Must-Haves

The goal: Spend 2 minutes per resume, not 20.

How to do it:

1. Create a simple checklist of your "Must-Haves" from the job description
2. Scan each resume for ONLY those items
3. Mark: ✓ Has it / X Doesn't have it
4. Only interview candidates who check ALL the must-have boxes

Example Screening Checklist:

Must-Have	Candidate A	Candidate B	Candidate C
2+ years admin experience	✓	✓	X
Proficient in Excel	✓	?	✓
Local/willing to commute	✓	✓	✓
Interview?	YES	MAYBE	NO

STEP 4: Use Structured Interviews

The problem with unstructured interviews: You end up asking different questions to different candidates, then trying to compare apples to oranges.

The solution: Ask the **same questions** to **every candidate** for the same role.

How to build your question list:

5. Take your 3-5 key responsibilities from the job description
6. Create 1-2 questions per responsibility that ask "Tell me about a time when..."
7. Use these exact questions with every candidate

Example Interview Questions:

Responsibility	Behavioral Question
Manage scheduling	"Tell me about a time you had to juggle multiple calendars or priorities. What happened, and how did you handle it?"
Answer phones/customers	"Describe a situation where you dealt with a frustrated customer or caller. What did you do?"
Process invoices	"Walk me through how you've handled invoice processing in the past. What system did you use?"

Time per interview: 30-45 minutes

STEP 5: Score Each Answer (1-5)

Why scoring matters: It turns "gut feelings" into actual data you can compare.

The 1-5 Scale:

Score	Meaning	Look For
1	Poor	No relevant experience, vague or concerning answer
2	Below Average	Limited experience, struggled to give concrete example
3	Average	Adequate experience, reasonable answer
4	Good	Strong experience, clear example with good outcome
5	Excellent	Exceptional experience, impressive results, great fit

How to use it:

- Write the score (1-5) next to each question immediately after the candidate answers
- Add brief notes about why you gave that score
- Total the scores at the end
- Compare totals across candidates

STEP 6: Check References

Don't skip this. Many problems could have been caught with a 10-minute call.

Ask these 5 questions to every reference:

- "How do you know [Candidate], and in what capacity did you work together?"
- "What were their main responsibilities?"
- "What would you say were their greatest strengths?"
- "What areas did they need to develop or improve?"
- "Would you hire them again if you had the opportunity?"

Red flags to listen for: Hesitation on the "hire again" question, vague answers that don't match what the candidate told you, reference can't confirm dates/title/responsibilities, mention of attendance, attitude, or reliability issues.

STEP 7: Send a Written Offer

Never make a verbal-only offer. A written offer letter:

- Confirms the details (title, pay, start date, schedule)
- Sets clear expectations
- Protects you legally
- Looks professional

Basic offer letter includes:

Element	Example
Position Title	Administrative Assistant
Start Date	February 15, 2026
Compensation	\$50,000 per year, paid bi-weekly
Schedule	Monday-Friday, 8:30am-5:00pm
Employment Type	Full-time, at-will
Reports To	Jane Smith, Office Manager
Signature Line	Space for candidate to sign and date

Action 1 Summary: What You'll Create

Document	What It Does	Pages
Job Description Template	Describes what you're hiring for	1 page
Interview Question Bank	Standardized questions by role type	1-2 pages
Interview Scorecard	Score sheet for comparing candidates	1 page
Reference Check Guide	5 questions + red flag indicators	1 page
Offer Letter Shell	Fill-in-the-blank offer template	1 page

Total setup time: 30-60 minutes

Template available: Hiring Process Template (available in BizHealth.ai platform)

Before vs. After: Hiring

Before (Ad-Hoc)	After (Documented Process)
Post a vague job description	Clear job description with must-haves
Interview whoever applies	Screen against must-haves first
Ask random questions	Ask the same questions to everyone
"Trust your gut"	Score objectively (1-5)
Skip references ("they take too long")	Check references (10 minutes each)
Verbal offer over the phone	Written offer letter with clear terms
Result: 40% chance of bad hire	Result: Much lower risk of bad hire

Part 1 Checkpoint

You've just learned how to:

- ✓ Write a job description that attracts the right people
- ✓ Screen resumes efficiently (2 minutes, not 20)
- ✓ Run structured interviews that predict performance
- ✓ Score candidates objectively so you can compare
- ✓ Check references without feeling awkward
- ✓ Send a professional offer letter

Time invested: 5-6 minutes reading

Time to implement: 30-60 minutes to set up your first hiring process

ROI: Prevent even ONE bad hire = **\$30K-\$100K saved**

Coming Up in Part 2...

You now have the foundation for Action 1.

In Part 2, we'll cover:

- **Action 2:** Creating your onboarding checklist (so new hires get productive fast)
- **Action 3:** Drafting your employee handbook outline (so you're legally protected)

- **Your Implementation Path:** How to actually get these done this week
- **Your Commitment Tool:** Setting a deadline and accountability partner
- **Your Next Steps:** Where to go after HR 101

Ready to continue? Let's build on this momentum.

PART 1 OF 2 COMPLETE

Continue to Part 2 to complete Lesson 5



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HR 101 Foundation | Lesson 5 (Part 1 of 2) | Version 1.3 | January 2026