

# Hiring preparation checklist - Claude

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The user is asking what they need to have ready before they can start hiring. This is a foundational operational question. Let me think through what needs to be in place before InTime can effectively hire team members.

Looking at the documents:

1. From the Master Business Foundation - I can see the organizational structure, HR policies, compensation structure, etc.
2. From the Financial Model - I can see the capital allocation and cost structure
3. From the Monday Setup Guide - I can see the operational systems needed

Before hiring, they need:

## Legal/Compliance Foundation:

- Entity registrations (they have this - India, USA, Canada)
- Tax registrations
- Employment contracts/agreements
- HR policies documented
- Payroll system

- Benefits structure

### **Financial Infrastructure:**

- Banking accounts
- Payroll processing system
- Accounting system
- Payment methods
- Budget allocation (\$300K is allocated)

### **Operational Systems:**

- Monday.com boards configured (they have 14 boards but need Candidates\_Master added)
- Communication tools (Teams, email - they have this)
- File storage (OneDrive - they have this)
- Role definitions and JDs
- Training materials for onboarding
- Performance tracking system

### **Business Assets:**

- Client contracts/MSP agreements (they have Collabera and Dexian)
- Service agreements templates
- Initial revenue pipeline
- Cash flow to support 3-6 months of operations

### **Recruitment Infrastructure:**

- Job descriptions for each role
- Recruitment process
- Interview scorecards
- Offer letter templates
- Onboarding program

Let me structure this as a comprehensive checklist with priorities and current status based on their documents.

## **PRE-HIRING READINESS CHECKLIST**

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### **What You Need Before Making Your First Hire**

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Based on your current status and \$300,000 allocated capital, here's your complete preparation roadmap:

## **ALREADY IN PLACE (You Have These)**

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### **Legal Foundation**

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-  Company registrations (India Pvt Ltd, USA LLC, Canada Inc)
-  Basic banking setup
-  Initial capital allocated (\$300K USD)

### **Technology Infrastructure**

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-  Microsoft Teams (collaboration)
-  OneDrive (file storage)
-  Monday.com (14 boards configured)
-  Basic website/landing page

### **Business Assets**

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-  MSP partnerships (Collabera, Dexian)
-  25 trained consultants on bench
-  Operational playbooks (your 3 documents)

## **CRITICAL - MUST COMPLETE BEFORE HIRING (Week 1-2)**

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### **1. LEGAL & COMPLIANCE DOCUMENTS**

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#### **India Operations:**

Priority 1:

- Employment Agreement Template (Per Section 13.1)
- Offer Letter Template (Appendix A.3)
- NDA/Confidentiality Agreement
- Code of Conduct Document
- Disciplinary Policy Document

Priority 2:

- PF/ESI registration (mandatory in India)
- Professional Tax registration
- Labor law compliance checklist
- Shops & Establishment Act registration

**Cost:** ₹50,000 (\$600 USD) - Legal documentation **Timeline:** 1 week with lawyer

## 2. HR POLICY DOCUMENTATION

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Must Have Before Day 1:

- Employee Handbook (Sections 13-15 of Master Doc)
- Leave Policy (documented from Section 13.1)
- Work Hours & Schedule
- Probation Policy (3 months standard)
- Performance Review Process
- Termination/Exit Policy
- Grievance Redressal Process
- Anti-Harassment Policy

**Action:** Convert Section 13 of Master Document into formal Employee Handbook **Cost:** \$0 (use existing content) **Timeline:** 3 days to formalize

## 3. FINANCIAL INFRASTRUCTURE

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Banking & Payments:

- Separate payroll bank account
- Payment gateway for training fees
- Invoice numbering system
- Expense reimbursement process

Accounting System:

- QuickBooks/Zoho Books subscription (\$50/month)
- Chart of accounts setup
- Expense categories defined
- Revenue tracking system
- Tax compliance calendar

Payroll System:

- Payroll processing method (recommend: Razorpay Payroll or Zoho Payroll)
- Salary structure templates (from Section 14.1)
- TDS calculation system
- PF/ESI deduction setup
- Salary slip templates

**Cost:** \$100/month for software **Timeline:** 1 week setup

## 4. MONDAY.COM CRITICAL ENHANCEMENT

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Add Before Hiring:

- CANDIDATES\_MASTER board (from Monday Guide Section 2)
- HR\_Employee\_Records board (new - see below)
- Timesheet\_Tracking board (for pod productivity)
- Commission\_Tracker board (from Section 14.1)

Setup Automations:

- New hire onboarding workflow
- Daily attendance tracking
- Performance review reminders
- Leave approval workflow

### New Board Structure: HR\_Employee\_Records

Columns:

- Employee ID (Auto-number: EMP-001)
- Full Name
- Role (Dropdown: Recruiter/Bench Sales/Training/Support)
- Pod Assignment (Dropdown)
- Start Date
- Employment Type (Probation/Confirmed)
- Salary (Numbers - confidential view)
- Manager (Person)
- Status (Active/On Leave/Exited)
- Documents (Files: Offer, Agreement, ID proof)
- Performance Rating (Numbers)
- Last Review Date
- Next Review Date

**Cost:** \$0 (existing Monday.com subscription) **Timeline:** 2 days to configure

## **IMPORTANT - COMPLETE BEFORE WEEK 1 (Week 2-3)**

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## 5. ROLE-SPECIFIC JOB DESCRIPTIONS

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Create Detailed JDs for First 6 Hires:

- Operations Manager
- 2x Recruiting Pod Members
- 2x Bench Sales Pod Members
- 1x Training Sales Representative

Each JD Must Include:

- Role purpose
- Reporting structure
- Key responsibilities (from Section 4)
- Daily/Weekly/Monthly targets
- Required skills
- Compensation range (from Section 14.1)
- Growth path

## **Template Structure (Example: Recruiter):**

TITLE: Technical Recruiter - Recruiting Pod

REPORTS TO: Operations Manager

LOCATION: Remote (India)

SALARY: ₹30,000-40,000/month + commissions

### **ROLE PURPOSE:**

Source and screen candidates for client requirements across all technologies

### **DAILY TARGETS:**

- Review 100 profiles
- Contact 50 candidates
- Screen 5 qualified candidates
- Submit 2 candidates to requirements

### **MONTHLY TARGETS:**

- 1 placement (Month 1-2)
- 2 placements (Month 3-4)
- 5 placements (Month 5+)

### **COMMISSION:**

- ₹5,000 per placement
- ₹15,000 bonus for 5+ placements
- ₹5,000 quality bonus for 90-day retention

### **REQUIRED SKILLS:**

- LinkedIn Recruiter experience
- Technical screening ability
- Excellent communication
- USA time zone flexibility

**Cost:** \$0 (internal creation) **Timeline:** 1 week

## **6. ONBOARDING PROGRAM**

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### **Week 1 Onboarding Structure:**

Day 1: Company orientation, systems access

Day 2: Role training, SOP review

Day 3: Monday.com training, process walkthrough

Day 4: Shadowing current operations

Day 5: First assignments with supervision

### **Create Materials:**

- Welcome presentation (company vision/mission)
- Systems access guide (Teams, Monday, email)
- SOP training videos (record your current process)
- Pod-specific training modules
- Buddy assignment system
- 30-60-90 day success metrics

**Cost:** \$0 (internal creation) **Timeline:** 1 week to prepare materials

## 7. PERFORMANCE TRACKING SYSTEM

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Setup in Monday.com:

- Individual KPI dashboard for each role
- Weekly performance tracking
- Commission calculation automation
- Monthly review workflow

KPIs by Role (from Section 15.1):

Recruiters:

- Placements per month
- Quality score (client satisfaction)
- Time to fill
- Submission to interview ratio

Bench Sales:

- Consultants marketed daily
- Submissions per week
- Placement rate
- Consultant satisfaction

Training Sales:

- Leads generated
- Demo conversion rate
- Enrollments per month
- Student satisfaction

**Cost:** \$0 (Monday.com configuration) **Timeline:** 3 days

## NICE TO HAVE - COMPLETE BEFORE MONTH 1 (Week 3-4)

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## 8. RECRUITMENT INFRASTRUCTURE

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Sourcing Tools:

- LinkedIn Recruiter license (3 seats) - \$180/month
- Job board subscriptions (Dice, Indeed) - \$500/month
- Chrome extensions (Contact finder, Email finder)
- Boolean search training materials

Screening Tools:

- Video interview platform (Zoom Pro) - \$15/month
- Technical assessment platform (optional)
- Background check vendor (tie up)

**Cost:** \$700/month **Timeline:** 1 week to setup

## 9. TEAM COLLABORATION INFRASTRUCTURE

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Communication:

- WhatsApp Business groups (Pods)
- Teams channels structure
- Daily standup format
- Weekly review format

Knowledge Base:

- SOP documentation in SharePoint
- Training video library
- Best practices repository
- Templates library

**Cost:** \$0 (use existing Teams/OneDrive) **Timeline:** Ongoing

## 10. BENEFITS & PERKS SETUP

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Mandatory Benefits (India):

- Health insurance vendor (₹5,000/person/year)
- PF/ESI compliance setup
- Professional tax registration

Optional Benefits:

- Internet allowance process (₹1,500/month)
- Phone allowance process (₹1,000/month)
- Learning & development budget (₹25,000/year)

**Cost:** ₹10,000/employee/year **Timeline:** 1 week to finalize vendors

## BUDGET ALLOCATION FOR HIRING PREPARATION

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### One-Time Setup Costs

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Legal documentation: \$600

Accounting software setup: \$200

HR software/Payroll: \$150

Recruitment tools setup: \$300

Insurance setup: \$200

Miscellaneous: \$550

TOTAL ONE-TIME: \$2,000 USD

## Monthly Recurring Costs (Before Hiring)

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Accounting software: \$100

Payroll software: \$50

Recruitment tools: \$700

Insurance: \$100

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TOTAL MONTHLY: \$950 USD

## First Month Payroll (6 Employees)

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Per Financial Model Section 12.1:

Salaries: ₹560,000 (\$6,700 USD)

Benefits (25%): ₹140,000 (\$1,675 USD)

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TOTAL FIRST PAYROLL: \$8,375 USD

**Total Capital Needed Before First Hire: \$11,325 USD Available Capital: \$300,000 USD ✓**

Runway: 33+ months at full operation

## IMMEDIATE ACTION PLAN (NEXT 2 WEEKS)

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### Week 1: Foundation (You do this NOW)

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Monday-Tuesday:

- Engage lawyer for employment documents
- Setup accounting software (Zoho Books)
- Create HR\_Employee\_Records board in Monday.com
- Add CANDIDATES\_MASTER board in Monday.com

Wednesday-Thursday:

- Formalize Employee Handbook from Master Doc Section 13
- Create 6 detailed Job Descriptions
- Setup payroll system (Razorpay/Zoho)
- Design commission tracking system

Friday:

- Record onboarding training videos
- Setup Teams channels for each pod
- Create performance KPI dashboards
- Prepare welcome kits (digital)

## **Week 2: Finalization (Ready to Hire)**

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Monday-Tuesday:

- Legal documents review and approval
- Banking setup for payroll
- Insurance vendor finalization
- Benefits structure communication ready

Wednesday-Thursday:

- Post job descriptions
- Setup recruitment pipeline in Monday.com
- Create interview scorecards
- Prepare offer letter templates

Friday:

- Test all systems end-to-end
- Run mock onboarding process
- Verify compliance checklist
- Get ready to interview!

## **✓ HIRING READINESS CHECKLIST**

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**You're Ready to Hire When:**

Legal:

- All employment documents template ready
- Compliance registrations complete
- Insurance policies active

Financial:

- Payroll system functional
- Bank accounts operational
- Accounting system tracking everything

Operational:

- Monday.com fully configured
- Onboarding program ready
- Performance tracking live
- Communication channels setup

Documentation:

- Employee Handbook finalized
- All JDs created
- SOPs accessible
- Training materials ready

## **⌚ FIRST HIRING PRIORITIES (Based on Revenue Goals)**

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**Sequence of Hiring (After Readiness):**

**Month 1 (November - Training Launch Priority):**

1. **Training Sales Rep** (Week 1) - Critical for Nov training launch
2. **Operations Manager** (Week 2) - To oversee pods
3. **Recruiting Pod Member #1** (Week 3)

**Month 2 (December - Scale Operations):** 4. **Bench Sales Pod Member #1** (Week 1) 5. **Recruiting Pod Member #2** (Week 2) 6. **Bench Sales Pod Member #2** (Week 3)

### Why This Sequence:

- Training revenue starts immediately (November target: 20 students = \$33,900)
- Operations Manager coordinates growing team
- Recruiting + Bench Sales pods build placement pipeline
- By Month 3, full operational capacity for 6+ placements/month

## CRITICAL SUCCESS FACTORS

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### Don't Hire Until:

1.  You can pay 6 months salary from capital (You can - \$50K allocated vs \$300K available)
2.  All legal documents are signed and stored
3.  Onboarding program tested end-to-end
4.  Performance metrics configured and working
5.  You have at least 10 active job requirements to work on

### Start Recruiting When:

- All checkboxes in Week 1 plan are complete
- Training program launch is confirmed for November 1
- MSP portals have active requirements
- You're confident in your ability to train and manage

**BOTTOM LINE:** You need **2 weeks of focused preparation** and **\$11,325 initial investment** before making your first hire. Your \$300K capital gives you a **33-month runway** - more than enough to build to profitability by Month 4.

**Next Step:** Start Week 1 action plan TODAY. Begin with legal documents and Monday.com configuration.