

# Hiring preparation checklist - Claude

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BY ANTHROPIC

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)**

## 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

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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.