

[FREE CHECKLIST]

A CLEAR ROADMAP TO STREAMLINED HR PROCESSES

*Refine your core HR practices to enhance your
employee experience from hire to retire*



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Dear Business Leader,

Thank you for downloading our HR checklist - a comprehensive tool designed to help you prepare your workforce for growth and scaling. At Simmons HR & Talent Advisory, we recognize the critical role that streamlined HR processes play in shaping your company's culture and optimizing the employee experience throughout their journey with your organization.

Running a successful small or medium-sized enterprise (SME) is a multi-faceted endeavor, and we believe that effective HR management is a cornerstone of that success. This HR checklist is more than just a list of tasks; it's a roadmap to refining your HR processes and fostering a culture of excellence where you can better maintain employee buy-in, satisfaction, and overall retention. Here's what it can help you do:

**Streamline efficiency | Cultivate culture | Effectively attract and develop talent |
Improve Compliance | Boost Productivity**

We understand the unique challenges faced by SMEs in today's competitive landscape, and we are here to provide guidance and support every step of the way. Our mission is to help you transform your employee experience and reduce turnover by cultivating an environment where your employees thrive - from the moment they join your team until the day they retire.

So, welcome to your HR checklist! Your journey to improved culture and enhanced employee experiences begins here. This checklist is intended to be a general guide, and if you need further assistance, our team of consultants is ready to partner - **schedule a call to get started today.**

Kenyetta Simmons, mba phr

CEO & Principal HRBP

RECRUITMENT & HIRING

CHECKLIST

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1.1 Define Clear Job Descriptions & Specifications

- Identify the role's core responsibilities and tasks
- Specify required vs. preferred qualifications, skills, and experience
- Determine reporting relationships and cross-team collaborations
- Clearly define expectations and performance metrics

1.2 Develop an Attractive Employer Brand

- Craft a strong mission statement that provides clear direction & purpose
- Clarify & promote your company values and unique selling points
- Create a visually appealing & informative Careers page on your website
- Highlight employee testimonials, success stories, and culture details

1.3 Create an Effective Recruitment Strategy

- Identify where your target candidates are most active
- Utilize job boards, social media, employee referrals & industry sites
- Consider partnering with staffing agencies or professional orgs
- Diversify your sourcing strategies to reach a broader pool of talent

1.4 Develop a Structured Interview Process

- Develop a consistent interview framework for all candidates
- Create a list of standardized interview questions related to job requirements
- Include behavioral and situational questions to assess skills and abilities
- Train interviewers on managing bias and avoiding illegal questions

1.5 Conduct Background & Employment Verification

- Ensure compliance with legal requirements for background checks
- Verify candidates' employment history, education, and certifications
- Verify employment eligibility by accurate completion & storage of I-9s
- Maintain a confidential and secure process for handling sensitive data

1.6 Develop an Onboarding Plan for New Hires

- Prepare an onboarding checklist with key tasks and milestones
- Identify departmental stakeholders involved in the onboarding process
- Create a welcoming and informative orientation program
- Provide resources, training, and support to accelerate integration into the organization

ONBOARDING & ORIENTATION CHECKLIST

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2.1 Develop a Standardized Onboarding Program

- Develop individualized onboarding plans for different roles and levels
- Create a clear timeline with milestones to track progress
- Involve relevant departments or teams in onboarding to provide specialized training
- Provide a checklist to new hires outlining what they need to know and do during their first few weeks

2.2 Prepare New Hire Paperwork

- Ensure all paperwork is compliant with employment laws and regulations (I-9s)
- Utilize electronic document management systems for a streamlined paperwork process
- Provide new hires with a copy of the employee handbook, containing company policies and procedures
- Help employees understand and complete benefit enrollment forms

2.3 Conduct Orientation and Training

- Host an orientation session on the first day to welcome new hires and introduce key team members
- Deliver role-specific training sessions to help new employees perform their job effectively
- Ensure new hires have access to and know how to use essential tools and equipment
- Provide safety & security training to create a secure work environment

2.4 Assign an Onboarding Buddy or Mentor

- Choose experienced employees as buddies to guide and support new hires
- Schedule regular buddy check-ins to address questions, concerns, and challenges
- Encourage new hires to build relationships with colleagues beyond their buddy

2.5 Review Company Culture and Values

- Conduct a session to familiarize new hires with the company's culture, values, and mission
- Discuss the importance of aligning with company culture and how each employee contributes to it
- Share success stories or anecdotes that embody the company's culture

2.6 Continuously Seek Feedback for Improvement

- Create a feedback mechanism for new hires to share their onboarding experiences
- Regularly analyze feedback to identify areas for improvement
- Adapt onboarding programs based on feedback and changing business needs
- Provide ongoing support to new hires beyond their initial onboarding period

EMPLOYEE RELATIONS

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3.1 Develop HR Policies & Procedures

- Develop comprehensive HR policies that align with business needs
- Communicate these policies to all employees in an employee handbook
- Regularly update policies to reflect legal changes and evolving needs
- Ensure policies are accessible and understandable to all employees

3.2 Maintain Accurate Personnel Records

- Establish a secure & organized system for maintaining employee data
- Keep records of employment contracts, performance reviews, & disciplinary actions
- Store confidential information securely, in compliance with data protection laws
- Routinely audit and update personnel records for accuracy

3.3 Handle Employee Grievances & Concerns

- Create a structured process for employees to submit complaints or grievances
- Assign a designated HR person or team to handle submissions
- Conduct fair and objective investigations into complaints
- Document all steps taken and outcomes for future reference

3.4 Integrate Effective Communication

- Implement regular channels for communication (team meetings, 1:1s, surveys, or town halls)
- Encourage open, honest, and two-way communication between employees & management
- Provide training in effective communication and conflict resolution
- Foster a culture of transparency and accessibility top-down

3.5 Ensure Compliance with Employment Laws

- Stay updated on labor laws and regulations at local, state, and federal levels
- Conduct regular audits of HR policies and practices to ensure compliance
- Train management teams on legal requirements and best practices
- Seek legal counsel as needed to ensure compliance with complex labor laws

3.6 Cultivate a Positive Organizational Culture

- Ensure that your leadership team exemplifies the company's core values
- Encourage employee involvement and participation in decision-making processes as appropriate
- Recognize and celebrate milestones, achievements, and positive contributions to the culture
- Embrace diversity and ensure that policies and practices promote equity

PERFORMANCE MANAGEMENT

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4.1 Set Clear Performance Expectations

- Define key objectives/responsibilities for each role in your organization
- Collaborate with employees to establish SMART goals for measuring performance
- Ensure that individual performance goals tie back to the overall organizational objectives

4.2 Implement Regular Performance Reviews

- Conduct regular performance reviews, such as quarterly or semi-annually depending on your organization's needs
- Create two-way dialogue, allowing employees to share their input and concerns
- Keep records of performance ratings and discussions for future reference
- Integrate digital software (or an HRIS) to manage the process

4.3 Provide Constructive Feedback

- Offer feedback promptly, both for achievements and improvements
- Ensure feedback is specific, objective, and constructive
- Acknowledge and praise employees for their contributions
- Discuss opportunities for growth and skill enhancement

4.4 Recognize & Reward Performance

- Establish recognition programs to acknowledge high performance
- Provide tangible rewards, such as bonuses, gift cards, or other incentives
- Encourage peer-to-peer recognition to foster a culture of appreciation
- Utilize recognition software to foster "anytime, anywhere" acknowledgement

4.5 Address Poor Performance & Development

- Identify poor performance early to address issues before they escalate
- Provide clear feedback on areas that require improvement
- Discuss additional resources employees may need to overcome performance issues
- Collaborate with employees to create individual development plans to sharpen skills and capabilities

4.6 Performance Improvement Plans (PIPs)

- Develop structured Performance Improvement Plans for employees who consistently underperform
- Outline clear expectations on specific goals and actions that need to be taken
- Offer support, regular check-ins, and coaching to help employees meet the plan's objectives
- Clarify timelines for addressing performance issues & potential consequences if improvements are not made

PREVIOUS

STAKEHOLDER TESTIMONIALS



SENIOR DIRECTOR, TALENT ATTRACTION & INSIGHTS

I found [Kenyetta] quite talented at her ability to project manage. She was able to understand the objective with incredibly limited historical context. She put together a project plan and [served as the project lead]. Throughout the project, she kept the team on task, the stakeholders informed and delivered quality outputs. [She's] a real asset to the organization.



SENIOR ENGINEERING MANAGER

Kenyetta has been a great partner to work with. I most appreciate her agenda-driven approach to meetings and her organizational style. I've been [here] for 3 years and she's better than I've ever had on that front. Everyone in the company could benefit from adopting her approach to meetings.



SENIOR DIRECTOR OF PRODUCT MANAGEMENT

Thank you for being such an amazing recruiting partner. Your organization, communication, attention to detail, and easy-to-follow process made this one of the most seamless hiring experiences during my time at [this company]. You are a true professional and you instantly made me feel that you had it covered and I wasn't going to have to be checking in constantly to move things along. And, for an added bonus, every single candidate you passed on to me made it to the screen and onsite interview rounds. I think that speaks volumes about your ability to translate a hiring manager's needs into a successful initial screen. You encapsulate our values AND get the job done! Five stars. Hope to work with you again.



NEED DEEPER STRATEGY & SUPPORT?

OUTSOURCE YOUR HR TO OUR TEAM OF CONSULTANTS!

Contact us today for a complimentary consultation and find out how our HR and Talent advisory services can help your enterprise take its employee experience & culture to the next level.

SCHEDULE YOUR CONSULTATION NOW

