NEW STARTER EMPLOYEE LIFECYCLE PLAYBOOK

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The purpose of completing this **HR Lifecycle Playbook** checklist is to evaluate critical work streams and infrastructure that is needed for companies who are starting up operations and/or are operating without any formal HR resourcing to consider the importance of establishing culture, an employer value proposition and ultimately ensuring best practice policies and processes are established to mitigate risk. **Note: This playbook assumes that the company is legally set-up to operate in the location(s) as those details are not included.**

HR Lifecycle Playbook

Lifecycle Category	Functional Area	Lifecycle Description
Planning	Strategic Plan	Establish a short and long-term strategy for people, culture, future state organizational structure, and the legal and HR and business processes optimally recommended to achieve day (1) operations. This will vary if it is a new company, a newly acquired company or an existing company operating without a dedicated HR resource
	Project Plan	Develop a comprehensive project plan with key milestones and timing established to achieve readiness for operations. Example: Domestic state(s) and/or global payroll set-up, identified key roles to hire, compensation and benefits packages. Recommend that the company follow a program management methodology and set up a project office to ensure key deliverables and work streams are being identified, planned and executed timely
	Culture	In partnership with owner/investors or core executive team, we will engage in a few sessions to define the future state Employer Value Proposition (EVP) and attributes of the desired culture recognizing all key stakeholders: candidates, employees, vendors/suppliers, and other external partners. The outcome should lead to a framework that would help the leadership document a vision, mission, core values, pillars and/or operating principles.
	Diversity, Equity & Inclusion	In partnership with leadership, we will create a starting point plan to establish a philosophy and process to hire and promote diverse candidates to reach their highest potential. As the company evolves, we can support ongoing initiatives to ensure the Company is committed to creating an inclusive work culture through allyship, employee and leadership development and ongoing assessment and feedback.
		ADD OTHER - PLEASE ADD OTHER IMPORTANT AREAS
HR Operations	Payroll	Decision to process payroll internally or selection of external vendor to set-up payroll including set-up, quarterly taxes, annual reporting, etc.
	System	If external, recommend a company with an HCM (human capital management) module to run payroll upon team members hired, administer end to end employee lifecycle processes, set-up business intelligence data and analytics and future KPI's. Alternatively, the Company can consider using a professional employer organization (PEO) to fully outsource who are experts in ensuring all legal and tax requirements are met. Typically, ideal for 0-200 employee companies
	Benefits	Identify external benefits broker to set-up health and welfare benefits package; based on budget parameters established
	Employee Handbook	Based on size of company, create employee handbook ("Culture Guide") to outline the rules of engagement, state and federal employee laws and other applicable company policies generally accepted for the industry/company
	Total Compensation	Establish a market competitive compensation philosophy and short and long-term approach to defining a total compensation structure to ensure consistency in hiring, promotions, transfers, etc. Areas on scope are base salary, short-term incentive and long-term incentive including equity plans
		ADD OTHER - PLEASE ADD OTHER IMPORTANT AREAS
Attract - Acquire "Best Talent"	Workforce Planning	Identify internal team **OR** external team to identify and recruit key roles needed based on the operating model and financial thresholds established
	Diversity Hiring	Develop a short and long term strategy to ensure a commitment to diversity sourcing and hiring to build quality pipeline for future upward mobility
	Job Profiles & Descriptions	Develop a standardized job description to recruit key roles using a best practice template; create a framework to define levels for future career pathing for retention purpose
	Pre-Hire Process	Set-up pre-hire process to conduct background, drug-test (if applicable), assessments, references and issue legally recommended offer letter, employment agreements (where applicable)
		ADD OTHER - PLEASE ADD OTHER IMPORTANT AREAS
Onboard	Orientation	Design and deploy a day (1) or week (1) new employee orientation to ensure the new team member is socialized on culture, facility (if applicable), key staff introductions, buddy (if assigned) and relevant policies
	On-the-job training	Set-up 30. 60, 90 day training and onboarding plan, so new hire is set-up for success
	Coaching & Feedback	Regular check in's with new hire to ensure job and culture fit including a post-hire survey at set periods
		ADD OTHER - PLEASE ADD OTHER IMPORTANT AREAS
Manage Performance	Performance Review	Establish a 90-day review period to start a culture of manager/team member feedback; decision if formal or informal review is appropriate
	Performance Management	Establish a performance management philosophy, performance plan year cycle to cover timing and frequency of setting goals, coaching/feedback, employee reviews (if applicable) and on-going development planning
	Performance Tracking	Establish a corrective action and progressive disciplinary action program (including performance improvement plans) up to involuntarily separation of team members to mitigate risk to the Company
		ADD OTHER - PLEASE ADD OTHER IMPORTANT AREAS
Grow, Develop & Engage	Becoming a Learning Organization	Design a learning and development framework for all levels, so employees can reach their fullest potential as an individual contributor or in a management career track; Training will include on-the-job training, HR/Compliance training, culture training, management and leadership development with a lense towards DEI and other targeted development needs customized for the company
	Talent Assessment & Succession Planning	Design a framework for talent assessment, progression planning and succession planning to ensure there are regular reviews of key staff, critical roles and readiness through development plans for team members to move into new roles to ensure a proactive plan to develop future pipeline; continual focus towards diverse career pathing and promotional opportunities
	Survey, Assess, Action Planning	Continually pulse the company through targeted surveys, focus groups, team meetings, 1:1's to measure target engagement levels are being met to align to culture and expected business results; establish a cadence of action planning to design programs that drive engagement and retention
		ADD OTHER - PLEASE ADD OTHER IMPORTANT AREAS
Offboard	Exit Process	Establish an exit interview/separation clearance process to ensure two-way feedback session is conducted through survey or face to face to collect feedback on staff voluntarily leaving to monitor trends; the clearance process is a checklist to collect assets and notification of employees of their post separation obligations
	Separation Agreement	If applicable, key roles and executives with separation agreements will be reviewed with HR and Legal
	Other Exits	Process to manage office closing, furloughs, layoffs, etc.
		ADD OTHER - PLEASE ADD OTHER IMPORTANT AREAS
Alumni	Employer Brand	Establish process to stay connected with team members who leave the company voluntarily as they can serve as a great referral of candidates to the company in the future

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Contact the team at Consult HR Partners for a complimentary consultation at info@consulthrpartners.com to discuss how we can support your team build out HR programs and initiatives across the Employee Lifecycle.