LEAD & SCALE

HIRING READINESS CHECKLIST

Confirm the need, role, economics, leadership capacity, and process before hiring.

2026 EDITION | PRACTICAL BUSINESS RESOURCE

01 / BUSINESS NEED

Confirm That Hiring Solves the Right Problem

Define the result the business needs and test whether hiring is the best response. Do not use a job title to conceal an unclear process, priority, or accountability problem.

Hiring decision	Definition
Business need / constraint	
Required result	
Evidence the need is persistent	
Customer / business impact	
Current owner / workload	
Target start date	
Hiring manager	
Executive approver	
Planning horizon	
Consequence of not hiring	

Alternatives considered

Alternative	Evidence / decision
Stop or simplify the work	
Automate or improve the process	
Delegate or redistribute	
Contract / outsource	
Temporary or fractional support	
Permanent hire	

02 / ROLE DESIGN

Define the Result Before the Job Title

Design the role around outcomes, decisions, recurring responsibilities, relationships, and measures. Separate essential requirements from preferences.

Role element	Definition
Role title	
Role purpose	
First-year outcomes	
Primary responsibilities	
Decisions owned	
Key relationships	
Measures of success	
Location / schedule	
Travel / physical requirements	
Growth path / future scope	

Role purpose in one sentence

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What this role will not own

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03 / CAPABILITY PROFILE

Define What the Person Must Be Able to Do

Translate the role into observable capabilities, experience, judgment, behaviors, credentials, and learning requirements.

Requirement	Essential	Preferred	How evaluated	Evidence standard
Technical / functional capability	☐	☐		
Industry / customer knowledge	☐	☐		
Decision judgment	☐	☐		
Communication	☐	☐		
Planning / execution	☐	☐		
Leadership / collaboration	☐	☐		
Technology / systems	☐	☐		
Required credential / license	☐	☐		
Language / location	☐	☐		
Learning agility	☐	☐		

☐ Requirements are linked to actual work and outcomes.

☐ Credentials are required only when legally or operationally necessary.

☐ “Culture fit” is replaced by defined values and work behaviors.

☐ The profile does not exclude capable candidates without business justification.

04 / EMPLOYMENT MODEL

Select the Appropriate Working Relationship

Compare permanent, temporary, part-time, contractor, fractional, outsourced, and other lawful models using the actual nature of the relationship.

Model	Business fit	Control / independence	Duration	Cost / flexibility	Risk / compliance	Decision
Full-time employee						
Part-time employee						
Fixed-term / temporary employee						
Independent contractor						
Fractional leader / specialist						
Agency / outsourced service						
Intern / apprentice						

Selected model and business rationale

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Professional advice or classification confirmation required

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05 / ECONOMICS

Confirm the Business Can Sustain the Role

Calculate the complete cost and the value or capacity the role must create. Use realistic ramp-up time and cash timing.

Cost / economic factor	Monthly	Annual	One-time	Assumption / source
Base pay / fees				
Variable compensation				
Payroll taxes / statutory costs				
Benefits / leave				
Recruiting / background checks				
Equipment / technology				
Workspace / travel				
Training / onboarding				
Management time				
Contingency				

Economic justification

Measure	Assumption
Total first-year cost	
Expected ramp-up period	
Revenue / capacity / risk value created	
Break-even or payback expectation	
Cash source and approval	

06 / MANAGEMENT READINESS

Confirm the Business Can Lead the New Hire

A good hire can fail under unclear priorities, unavailable management, weak systems, or inconsistent feedback. Confirm the operating environment before recruiting.

Readiness condition	Ready	Gap / evidence	Action	Owner	Due
Manager has time and capability	☐				
Role priorities are stable	☐				
Decision rights are clear	☐				
Workflows / SOPs exist	☐				
Systems and access are available	☐				
Performance measures are defined	☐				
Feedback rhythm is established	☐				
Team interfaces are understood	☐				
Workload and capacity are realistic	☐				
Conflict / escalation path is clear	☐				

Management gap that must be closed before the start date

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07 / RECRUITING PLAN

Build a Fair and Effective Search

Define the candidate pool, sourcing channels, schedule, responsibilities, communications, and evidence needed to make a sound decision.

Recruiting element	Plan
Target candidate profile	
Internal candidates / succession	
Sourcing channels	
Job description owner	
Application / resume review	
Interview panel	
Work sample / assessment	
Reference / background process	
Decision meeting	
Candidate communication standard	

Recruiting timeline

Milestone	Owner	Due
Role approved		
Search launched		
Shortlist complete		
Interviews complete		
Offer decision		
Target start		

08 / CANDIDATE EVALUATION

Use Consistent Evidence and Standards

Evaluate every serious candidate against the same role-related criteria. Record evidence before group discussion to reduce bias and improve decision quality.

Criterion	Weight	Candidate A	Candidate B	Candidate C	Evidence required
Essential capability					
Relevant experience					
Judgment / problem solving					
Communication					
Execution discipline					
Values / work behaviors					
Learning agility					
Role-specific assessment					
References / verification					

Decision record

Decision area	Record
Recommended candidate	
Strongest evidence	
Primary concern / risk	
Conditions or development needs	
Final decision owner	

09 / COMPLIANCE & RISK

Prepare the Required Employment Controls

Confirm applicable hiring, classification, pay, eligibility, privacy, safety, accessibility, recordkeeping, and contractual requirements before an offer is issued.

Compliance / risk area	Requirement	Owner	Evidence / status
Job classification / employment status			
Equal opportunity / nondiscrimination			
Pay range / wage requirements			
Work authorization / eligibility			
Background / reference consent			
Privacy / candidate records			
Accommodation / accessibility			
Offer terms / employment agreement			
Policies / handbook acknowledgment			
Safety / licensing / insurance			
Tax / payroll / statutory registration			
Cross-border / remote-work obligations			

Professional legal, payroll, tax, or HR review required

10 / OFFER & PREBOARDING

Prepare a Credible Commitment and Start

Ensure the approved offer, expectations, conditions, documents, systems, equipment, schedule, and communication are ready before the candidate commits or starts.

Readiness item	Owner	Due	Complete	Evidence / note
Compensation and terms approved			☐	
Written offer / agreement reviewed			☐	
Conditions and contingencies stated			☐	
Candidate questions answered			☐	
Start date and reporting details confirmed			☐	
Payroll / vendor setup complete			☐	
Equipment and system access requested			☐	
Workspace / remote setup ready			☐	
Manager and team communication prepared			☐	
First-week schedule prepared			☐	
Required forms and policies ready			☐	
Contingency if start is delayed			☐	

Offer conditions and approval authority

11 / ONBOARDING & SUCCESS

Plan the First 90 Days Before the Hire Starts

Define early outcomes, learning, relationships, resources, feedback, and evaluation so the new hire can become effective responsibly.

Period	Required outcomes	Learning / relationships	Manager support	Evidence
Before start				
Week 1				
Days 8-30				
Days 31-60				
Days 61-90				
Day 90 review				

Early success measures

Measure	Day 30	Day 60	Day 90
Role understanding			
Capability / output			
Quality / reliability			
Team / stakeholder integration			
Customer / business contribution			

12 / FINAL DECISION

Make and Record the Hiring Decision

Proceed only when the business need, role, economics, management capacity, lawful model, recruiting process, and onboarding plan are sufficiently ready.

Readiness area	Ready	Condition / gap	Owner	Due
Business need	☐			
Role and outcomes	☐			
Capability profile	☐			
Employment model	☐			
Budget and economics	☐			
Management readiness	☐			
Recruiting process	☐			
Evaluation standard	☐			
Compliance and risk	☐			
Offer and preboarding	☐			
90-day onboarding plan	☐			

Decision	Select	Meaning
PROCEED	☐	Begin or continue recruiting within approved controls.
PROCEED WITH CONDITIONS	☐	Close documented gaps before offer or start.
USE ALTERNATIVE MODEL	☐	Contract, outsource, automate, or redistribute instead.
DEFER	☐	Reassess at a defined trigger or date.
DO NOT HIRE	☐	The role is not justified or supportable.

Decision rationale, conditions, and approver

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Important: This checklist provides general workforce-planning guidance and is not legal, tax, payroll, immigration, benefits, safety, or employment advice. Confirm requirements with qualified professionals in every applicable jurisdiction.

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