SOP: The Tradie Web Guys' Guide To Recruitment

Goals

This Standard Operating Procedure is designed to give you the knowledge and tools to create a successful recruitment process for your business.

It will teach you how to:

- Prepare for and add a new role into your operations,
- Find, and interview applicants,
- Offer a job contract and onboard new employees.

Procedure Overview

The procedure that we have created for this SOP is simple, but our breakdown of it is incredibly detailed. Each step can include email templates, document structures, advice and strategy, questionnaires, checklists and more.

As a result of this, we've created an overview at the top for easy navigation. Clicking on the links in any of the steps below will take you to it's dedicated section in this SOP.

Here's the workflow for finding and recruiting skilled employees for your business:

1. Take a look at how you've hired in the past.
2. Update your business' org chart with the new role.
3. Create a document that clearly defines the responsibilities, limits and key performance indicators of your new role.
4. Write your job ad and start advertising your position across job platforms, social media and any other locations you prefer.
5. Once you've got some candidates lined up, set up some interviews.
6. Start conducting your interviews.

7. Once you've found a candidate you like, run a reference check.
8. If you're satisfied with the reference check, prepare the contract of employment and send it out.
9. Once your contract of employment has been signed, it's time to start the onboarding process.
10. With your new hire up and running, it's time to review and document your process.

Templates

In addition to designing and explaining each step of this procedure, we have also created a number of templates, questionnaires and checklists you can use throughout the process.

We've added the steps where these templates can be used for your reference. Click on any of the links to be taken to a downloadable version.

- Email template - 'Thank you for your application' (Step 5)
- Email template - Arranging an interview (Step 5)
- Email template - Unsuccessful application (Step 5)
- Email template - Interview details (Step 5)
- Candidate Interview Questionnaire (Step 6)
- Reference Check Questionnaire (Step 7)
- Onboarding Checklist (Step 9)

Tools to use

We have compiled a list of the different digital tools that we think can add value to the recruitment process we've designed, and to businesses in general.

We've listed the steps in this SOP they relate to, provided recommendations on how to use them and shared the software for these tools that we use at Tradie Web Guys.

- **Org chart building software (Step 2)**

- Use this to design the pyramid-like structure of your org chart. Starting with the owner at the top, then middle management and then general staff.
- Software we use: LucidChart

- **Google Workspace (Steps 3, 4, 5, 6, 8, 9, 10)**
  - Use this to digitally create, edit and store all employee documents, like onboarding checklists, signed contracts, and more.
  - Apps we use: Gmail, Google Drive, Google Docs, Google Excel, Google Slides and Google Forms

- **Digital document signing software (Steps 8, 9, 10)**
  - Use this when sending documents to your new hire to capture their signatures and automatically save a copy of the signed document to your business' digital HR folder.
  - Software we use: DocHub

- **Project management software (Steps 1 - 10)**
  - Use this to map out every step of your hiring and onboarding process, and make it easy to review and pinpoint any outstanding tasks.
  - Software we use: ClickUp

Procedure Breakdown

1. **Take a look at how you've hired in the past.**

   Before even thinking about creating a job ad for a new role, you want to take a look at how you've hired in the past. Try asking yourself these questions:

- Was there anything that stopped your hiring process in its tracks? Poor communication? A lack of good quality applicants?
- How smooth was onboarding? Did your new hire meet your expectations? Were they proactive in taking on their responsibilities and accountabilities?
- What was the atmosphere like amongst your team when the new hire was brought in? Was it positive?
- Did you struggle to retain the new hire? If so, what do you think caused them to leave?
- What was your outlook like during the hiring process? Do you think you could've judged too harshly or expected too much?

Asking these questions will help you identify any pain points that previously impacted your hiring.

To help you, here are some common issues we've seen in hiring processes, and their solutions.

- **Problem: Expecting a new employee to have all the answers.**

  Solution: Check your expectations at the door. No new hire is ever going to hit the ground running. Give them time and space to prove themselves.

- **Problem: No morale after onboarding.**

  Solution: Think back to when you first hired the new employee. Could their lack of morale be because they haven't seen the growth or responsibility they were promised?

- **Problem: High staff turnover (poor retention rates).**

Solution: Compare the business you sell in the interview with the reality of the job site. Are your people happy? Processes organised? Staff being paid on time?

- **Problem: Hiring with the wrong mentality.**

  Solution: Acknowledge when the problem could be you. Do you start with criticism when reading a resume? Do you let stereotypes determine who you interview?

After assessing past hiring processes, business owners are often able to pinpoint a few different areas that have impacted the overall success of their hiring.

Usually these areas are based around mindset and business atmosphere. It's important to get these in check before you start planning and filling your new role.

2. **Update your business' org chart with the new role.**

When you've got the right mindset and business atmosphere in place, you're ready to welcome a new hire.

The next critical step is *planning*, you need to get your ducks in a row before you can add a new one into the line.

In this step, you are going to:

a. Create a title for the role you are hiring for
b. Summarise the role's responsibilities
c. Add the role into your org chart.

When completing this step, you want to keep in mind what responsibilities you are trying to remove from yourself or another employee with a new hire.

This is going to help you in knowing where the role will sit, who they will report to, who they will work alongside, etc.

This step can also give you a better understanding of the position you're hiring for, which will help you when writing job ads and conducting interviews.

Plus, a clearly defined position in your org chart enables you to show candidates a potential career trajectory with your company.

Building out an org chart for the first time? Here's what you need to know:

- The point of an org chart is to map out the roles and responsibilities of the positions in your business.
- Knowing who is responsible for what can help you effectively offload work onto a new employee and avoid duplicate workflows.
- Don't overcomplicate your structure - believe it or not, it is possible to include too much detail in your org chart.
- Keep things simple with a role title in the actual org chart and then link off to brief descriptions of the responsibilities. You'll do more work on those later in a separate document anyway.
- The best structure for an org chart looks a lot like a pyramid. In a trade business that may look like business owners at the top, middle management underneath, and then general staff in teams below.

3. Create a document that clearly defines the responsibilities, limits and key performance indicators of your new role.

It's important to note that this outline is NOT a contract of employment.

In this step, you're going to create a document that builds upon the role outline that you've just added into your business' org chart.

This is going to become a key tool that you use in creating job ads, leading candidate interviews and managing onboarding.

In the role and responsibilities document, you want to include:

- Role title
- What team the role falls in (if any)
- Who the role reports to and/or oversees (if any)
- The objectives of the role
    - Think about your expectations for the role and use this to guide how you write its objectives.
- Any accountabilities or responsibilities
    - Think about what prompted the realisation that you needed a new hire - what jobs or processes do you need help handling?
- Demonstrated skills or personal requirements
    - Do you think there are key skills or qualifications that this position needs? List them here.
- Key Performance Indicators (KPIs)
    - What are you hoping to achieve by hiring someone into this role? Think about that when defining your KPIs.
- An outline of the payment structure
    - This is optional, as this is not a contract of employment. However, it can be good to have it written down and on hand.

This role and responsibilities document is going to help you give all the information to your candidates so they know what to expect from day one.

4. **Write your job ad and start advertising your position across job platforms, social media and any other places you prefer.**

   When writing the job ad, make sure you include the following information:

   - A little about the role
     - Title and remuneration (if you're comfortable sharing this)
     - Main responsibilities and accountabilities
     - Particular skills or qualifications you're looking for
   - Information about the history of your company and your team
   - Details about your customer base and the services you provide

   To help you get your job ad out there, here are some tips we've also got for promoting the position you have available:

   - Write it up as a blog post on your business' website and share it on your social media.
   - Ask local associations or business partners to share the blog about your available position on their social media or website.
   - Get the job ad online, but make sure it's on a professional website, like LinkedIn or Seek. If you put it on dodgy sites, you'll get dodgy applicants.
   - Contact your local trades training centre to see if they have a platform for graduate job seekers. Get your ad up there if so.
   - Hand out flyers to local cafes, supplier offices and more, sometimes your most qualified tradesmen are the ones buying pies at the bakery!

5. **Once you've got some candidates lined up, set up interviews.**

   When it comes to getting a candidate in for an interview, the following workflow is a simple but professional way to communicate.

   First, they send in their application.

   Upon receiving it, you send out a response thanking them for their application and advising a time frame on return contact.

   After reviewing their application, let them know via email if they've been unsuccessful or if you'd like them to come in for an interview.

   In the same email, suggest a time and place for the interview.

   Once you've settled on a time for the interview, send an email to the candidate with a summary of the details (Time, place, documents to bring, etc.)

   This process, though lengthy, creates a valuable paper trail of information from the get go.

   It also gives you the opportunity to measure how well a potential candidate communicates, right from the start.

6. **Start conducting your interviews.**

   The interview is where you want to use all the assets you've created up until this point to your advantage.

   Here are some tips from us to make it the best experience for both parties:

   - Use your org chart to **show candidates where they would sit in your team**, who they'll report to and who they'll work with.

- Also use your org chart to **show that a career with your company has a trajectory** and demonstrate where a candidate could move to.
- Use your role and responsibilities template to **break down the specifics**. Show candidates where their skills and qualifications will be used.
- **Run through the day-to-day**, what are the more general processes and workflows in your business? Share them with the candidate.
- **Don't come on too strong or too critical**. This conversation needs to flow easily and being too harsh from the jump can put people off.
- That being said, **be upfront about your expectations** for the role and be prepared to answer any questions about them.
- **Show that you're open to discussing remuneration in the interview**. Salary talk is uncomfortable for everyone, so being direct is your best bet.

Remember, if this is a candidate you want in your business, you have to sell them your company too - they won't sign a contract unless they want to work for you.

In the template section, you'll find a questionnaire we've written for you to use during the interview to help you structure your conversation.

7. **Once you've found a candidate you like, run a reference check.**

This step is pretty basic, you just need to follow-up with the references your candidate has supplied.

In the template section, you'll find a questionnaire we've written for you to use during a reference check so you get all the answers to the important questions.

8. **If you're satisfied with the reference check, prepare a contract of employment offer and send it out.**

In most businesses these days, they have a contract of employment template (of sorts, as responsibilities will vary depending on the position).

This is a basic document they've created with a lawyer or a HR professional, that can be duplicated and adjusted, depending on the new position.

It can be good for trade businesses to do this as it can save time and money, and protect your business when it comes to onboarding a new employee.

Once your contract of employment is ready, you need to send it to the candidate. We like using a digital document signing software, like DocHub, DocuSign, etc.

Trade businesses can benefit from using this software as it can be set up to save signed contract copies to an internal HR folder, or preferred location.

9. **Once your contract of employment has been signed, it's time to start the onboarding process.**

Every business is different when it comes to onboarding, and not just because different industries have different standards.

The size of your business, the role that you've hired for, the team a new employee will be working with and many more factors can influence onboarding.

Onboarding is all about identifying and completing the steps needed to successfully introduce a new employee into your business.

This can include things like, getting their details for payroll, getting their signatures on documents, teaching them the software and so on.

To help you create your own onboarding process, we've given you a basic checklist you can use as a starting point. You'll find it in the Templates section.

10. **With your new hire up and running, take the time to review and document your process.**

The last step of hiring and onboarding is review and documentation.

As your new employee starts to gain independence in their position and get better acquainted with their role, it's important to take a look back at the process.

Doing this is similar to Step 1, you want to go over how the process went, if there was anything that impacted your workflow and so on.

Part of this step is also *documenting* your processes. If they were successful and you're happy with them, you want to have it all set out ready for your next hire.

At Tradie Web Guys, we like using project management software to outline the steps in our processes because it makes it easy to go back and review.

In fact, we think trade businesses should get as much of their hiring and onboarding processes into project management software as soon as possible.

Why? Two reasons: simplicity and accessibility.

Having all your information in one place, including the steps to take, signatures required and checklists to complete, enables you to do the most effective hiring.

It makes it quick and easy to review your process, ensure you've got all the information and signatures you need, and follow-up on any incomplete tasks.

And that's it!

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