

A-Team Action Plan Worksheet

Build your bench. Grow your business. Retain your power players.

Your Next Hire

What role do you need to hire next?

What impact will this role have on your business in the next 6–12 months?

Prompt: Think about what's missing today that, if filled, would move your business forward faster.

Now that you've identified the next role you want to hire, it's time to think strategically about how to fill it. For many growing businesses, the best first move isn't always a full-time employee, it might be a Virtual Assistant (VA). VAs can take on critical tasks, free up your time, and help you grow without the overhead of a traditional hire. Let's explore whether this flexible option is the right fit for your business needs right now.

Hiring Smarter: Should You Start with a VA?

Virtual Assistants (VAs) can be your secret weapon for growth—without the overhead.

Before you hire in-house, ask yourself: Could a Virtual Assistant handle this?

VAs help entrepreneurs and small teams stay focused on what matters by taking over recurring tasks, admin work, and time-draining to-dos.

What Can a VA Do for You?

- Inbox & calendar management
- Social media scheduling & responses
- Customer service (email/chat)
- Bookkeeping & invoicing
- CRM updates and data entry
- Light project management or research

Self-Check: Should You Start with a VA?

- | | |
|---|---|
| <input type="checkbox"/> I spend 2+ hours a day on admin or repetitive tasks. | <input type="checkbox"/> I need help, but can't afford a full-time hire |
| <input type="checkbox"/> My inbox or schedule slows me down | <input type="checkbox"/> I'm willing to document a few processes and delegate |
| <input type="checkbox"/> I have systems, but no time to run them | |

If you checked **3 or more**, it might be time to explore a VA.

Example Platforms

- BELAY
- TaskBullet
- Upwork
- OnlineJobs.ph
- Freelancer.com
- Zirtual

Bonus Prompt

List 3 tasks you're currently doing that could be handled by a VA

1. _____

2. _____

3. _____

Role Fit: Culture Add + Skill

What does success look like in this role?

What values or behaviors should this person embody to thrive on your team?

What specific skills or experience are must-haves?



Tip: Hire for alignment, not just experience. Cultural "add" matters more than cultural "fit."

Where You'll Source

List 2–3 channels you'll use to attract talent:

Job boards:

Social/community networks:

Fair chance or non-traditional pipelines:

How will you engage your existing team in the hiring process?



Tip: Where you search shapes who you find.

Your PPPP Plan

A simple framework to guide inclusive, strategic hiring

P = People

Who will be part of the hiring process?

Who needs to be aligned before you make the hire?

P = Pipeline

Where will you consistently source future candidates?

Are you cultivating relationships with fair chance or non-traditional pipelines?

P = Practice

What steps will you follow to screen, interview, and evaluate candidates?

Are you using skills-based or values-based assessments?

P = Promise

What can you honestly promise every candidate you engage with?

What do you want to be known for as an employer?

Prompt: Write your “employer promise” in one bold sentence.

Assessing for Skills & Values

Top 3 skills I need in this role

1. _____

2. _____

3. _____

Top 3 values that matter to me as a founder

1. _____

2. _____

3. _____

One question I'll ask in the interview to check for both

Example : Tell me about a time when _____

Your Retention Move

What will you do to make this new hire want to stay?

How will you build belonging, growth, or flexibility into their experience?

Prompt: Circle one of the 3: Belonging / Growth / Flexibility. Then name a move you'll make in that category.

Interview Prep & Offer Planning Section

From Interview to Offer: Your A-Team Playbook

Make hiring intentional from the first conversation to the first day

Hiring Prep Checklist

- ☐ Clearly define role expectations + first 90-day success markers
- ☐ Choose 3 interview questions that assess skills + values
- ☐ Decide how you'll evaluate answers (notes? rubric?)
- ☐ Draft an offer letter or outline key terms
- ☐ Prepare onboarding plan for Week 1 and Month 1

10 Questions to Help You Hire with Confidence

Skills & Values-Based Interview Questions

1. Tell me about a time you solved a problem no one trained you for.
Why it works: Reveals problem-solving, resourcefulness, and initiative.
2. What part of your past work makes you most proud, and why?
Why it works: Surfaces intrinsic motivation and values.
3. Describe a time when you had to learn something quickly. How did you do it?
Why it works: Assesses adaptability and coachability key in fast-paced environments.
4. What does a great team culture look like to you?
Why it works: Evaluates alignment with your company's values and interpersonal expectations.
5. Tell me about a time when you received feedback that was hard to hear. What did you do with it?
Why it works: Assesses maturity, humility, and willingness to grow.
6. How do you typically prioritize your day when everything feels urgent?
Why it works: Reveals time management and strategic thinking.
7. What's one skill you're working on improving right now?
Why it works: Gives insight into growth mindset and self-awareness.
8. When have you gone above and beyond for a customer or teammate?
Why it works: Surfaces work ethic, ownership, and service orientation.
9. What kind of leadership brings out your best work?
Why it works: Helps the employer understand how to manage and retain the candidate.
10. Why do you want to work here?
Why it works: Uncovers how much the candidate understands and connects with your mission, product, or values.

Bonus: Offer Letter Prompts

Mini-template:

We're excited to extend this offer for the [ROLE] position. Based on your experience in [RELEVANT TASK] and your alignment with our values around [VALUES], we believe you'll be a powerful part of our team. Here's what success looks like in your first 90 days...

Week 1 & Month 1 Onboarding Prompts

What will this person need to feel welcomed?

What small win can they accomplish in Week 1?

What support or feedback rhythm will help them succeed by Month 1?

Onboarding Checklist

Even a simple onboarding plan builds confidence for first-time employers.

Checklist Items:

- ☐ Welcome message or video
 - ☐ First day checklist (workspace, tech, introductions)
 - ☐ Assign starter task for early momentum
 - ☐ Schedule check-ins (Week 1, Week 3, Day 45, Day 90)
 - ☐ Create a one-page Success Snapshot for the role
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Feedback and Retention loop

Now that they are hired, now what? Here's how you can retain great talent you recruit.

What motivates this hire?

How do they prefer feedback?

How will I show appreciation?

What growth conversations will I schedule?

Start Your SOPs – So People Can Succeed

Build Your Hiring Foundation with SOPs

SOP = Standard Operating Procedure. They don't have to be fancy, but they do help your hires succeed & help you sustain

Even a few simple SOPs can help you reduce confusion, build trust, and keep your team aligned. Think of them as your business playbook. What seems “obvious” to you won’t be obvious to your new hire.

SOPs to Start With:

Process	What to Include
Interview Questions	3–5 questions you ask every time, aligned to your company values
Offer Letter Format	How you present pay, expectations, start date, and benefits (if any)
Onboarding Plan	What your hire needs to know/do in Week 1 and Month 1
Task How-To's	Step-by-step instructions for recurring tasks (use Loom or Google Docs)
Evaluation Criteria	How you'll assess performance or check in at 30, 60, 90 days

Quick SOP Starter Template

SOP Title _____

Purpose (Why this SOP exists) _____

Who Uses It _____

Steps to follow

1. _____

2. _____

3. _____

If you had to hand this to someone tomorrow, would they know what to do?

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***Businesses with documented processes
grow 2x faster than those without.***

Small Biz Trends

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