

Hiring Planning Worksheet

A practical framework for deciding whether to hire, defining the role, understanding the cost, and planning for success.

Page 1 — Hiring Readiness

Why are you hiring?

Business problem to solve:

Work that is currently not being handled effectively:

Why is hiring the right solution?

What happens if you do not hire?

Hiring decision summary

Question	Response
Is this need urgent?	☐ Yes ☐ No
Is the work ongoing?	☐ Yes ☐ No
Can the work be automated?	☐ Yes ☐ No
Can the work be reassigned?	☐ Yes ☐ No

Page 2 — Role Definition and Success

Role details

Field	Notes
Working title	
Reports to	
Employment type	☐ Full-time ☐ Part-time ☐ Contractor
Target start date	

Primary responsibilities:

1.
2.
3.
4.

Essential skills or experience:

Helpful but nonessential skills:

Definition of success

Timeframe	Expected outcome
First 30 days	
First 90 days	
Six months	

How will success be measured?

Page 3 — Hiring Cost Worksheet

Estimate the recurring and one-time costs associated with the hire. Use the annual column for a full-year view.

Cost category	Monthly estimate	Annual estimate
Salary or wages	\$ _____	\$ _____
Employer payroll taxes	\$ _____	\$ _____
Benefits	\$ _____	\$ _____
Equipment and technology	\$ _____	\$ _____
Software	\$ _____	\$ _____
Recruiting	\$ _____	\$ _____
Training and onboarding	\$ _____	\$ _____
Other costs	\$ _____	\$ _____
Estimated total cost	\$ _____	\$ _____

Estimated monthly cost of hire:	\$ _____
Estimated annual cost of hire:	\$ _____
One-time hiring costs:	\$ _____

Page 4 — Affordability and Runway

Financial measure	Current amount
Average monthly revenue	\$ _____
Average monthly expenses	\$ _____
Available cash	\$ _____
Current monthly runway	_____ months
Additional monthly hiring cost	\$ _____
Runway after hiring	_____ months

How will this hire affect cash flow?

What assumptions are you making?

Affordability decision

☐ The business can comfortably support this hire
☐ The business can support this hire with conditions
☐ The hire should be delayed
☐ More financial information is needed

Page 5 — Hiring vs. Alternatives

Compare the available options before committing to a hiring model.

Option	Advantages	Concerns	Estimated cost
Full-time employee			\$ _____
Part-time employee			\$ _____
Contractor			\$ _____
Freelancer			\$ _____
Temporary worker			\$ _____
Automation/software			\$ _____
Reassign existing work			\$ _____
Delay the work			\$ _____

Preferred option:

■ Full-time employee	■ Part-time employee	■ Contractor
■ Freelancer	■ Temporary worker	■ Automation/software
■ Reassignment	■ Delay	

Why?

Page 6 — Hiring Plan and First 90 Days

Hiring plan

Planning item	Notes
Candidate sources	
What makes a strong candidate?	
Hiring process participants	
Interview stages	
Position opening date	
Target hiring date	

First 90 days

Period	Learning and performance goals
First week	
By day 30	
By day 60	
By day 90	

Systems, tools, and processes to learn:

Page 7 — Final Decision Checklist

Use this checklist to confirm that the hiring decision is supported by a clear business need, defined outcomes, and an affordable plan.

☐ I have identified a clear business reason for hiring.
☐ I understand what work the employee will own.
☐ I have defined the role and responsibilities.
☐ I have identified the required skills.
☐ I have defined measurable outcomes.
☐ I have estimated the complete cost of the hire.
☐ I have considered taxes, benefits, tools, recruiting, and training.
☐ I understand the expected monthly cost.
☐ I understand the effect on cash flow and runway.
☐ I have considered alternatives to hiring.
☐ I have a plan for finding and evaluating candidates.
☐ I have defined the first 30, 60, and 90 days.

Final decision

☐ Proceed with hiring	☐ Revise the hiring plan
☐ Explore an alternative	☐ Delay the decision

Notes:
