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**TEMPLATE**

**A Staffing Template for Your Integrative Health Business**

**Make a business case**

**Having employees is a substantial, but worthwhile, expense. In this section, consider the costs versus the benefits.**

**The costs:**

* Wages
* State payroll taxes
* State unemployment taxes
* Worker’s compensation insurance
* Employee benefits
  + Insurance?
  + Paid time off?
  + Meals/equipment?

**The benefits:**

* For example, increased revenue, higher productivity, expertise, etc.
* As much as possible, quantify expected increased sales (% increased client retention, % increase of retail products sold, etc.)

**Your core values**

**What does your business stand for? What qualities are most valuable to you in a team member? Document your core values below.**

**Feel free to use the examples included or add your own. Write a sentence or two describing what this value means to you and your employees.**

Community-driven

Respectful

Proactive

Committed to wellness

Humble

Helpful

Empathetic

Consciously evolving

Service-oriented

Team-player

Creative

Innovative

Fun

Energetic

**Job descriptions and postings**

**Each position, even if it’s only one person, should have a clearly defined job description and duties to ensure everyone’s needs are met.**

**Document your job descriptions here. We’ve included a template and examples to get you started.**

Short description:

Schedule requirements:

Compensation:

Detailed job expectations:

Ideal applicant description:

Next steps to apply:

***Example practitioner description and job posting: Massage therapist***

**(Short description)** We’re hiring a part-time, licensed massage therapist at our wellness center to provide healing massage treatments in a relaxing, welcoming environment.

**(Schedule requirements)** We’re looking for someone to be available for appointments at least 20 hours on Tuesdays, Thursdays, and possibly Sundays for at least three to six months. The ideal candidate will also be willing to fill in on occasional Fridays or Saturdays.

Pay rate will start at 40% commission and work up to 50% within a year if all job requirements are met and customer satisfaction exceeded.

**(Detailed job expectations/ideal applicant description)** You will be responsible for client intake, setting up and tearing down the treatment room, upselling, communicating clearly and effectively with front desk and managerial staff, and taking quick and accurate payments. You will use a computer, so some technical proficiency and comfort are necessary. Being aligned with our core values is a must <LINKTOCOREVALUES>.

**(Ideal applicant description)** The ideal candidate is dependable, diligent, self-motivated, confident, and great with people. They have been certified and practicing for more than two years. Being on time is absolutely necessary and calling in sick at the last minute cannot happen. Knowing, loving, and practicing health and wellness is a must.

The biggest responsibility is giving high-quality massages. You will also be responsible for client intake, setting up and maintaining the treatment room, upselling, communicating clearly and effectively with front desk and managerial staff, and taking payments quickly and accurately. Using a computer so some technical proficiency and comfort is necessary. Being aligned with our core values is a must <LINKTOCOREVALUES>.

(**Next steps to apply)** If you’re a great communicator, work well alone, take initiative, and are genuinely interested, please contact us! To apply, send your one-page resume and a short email describing why you think you’d be a good fit for the job to the email provided. We’re only accepting applicants via email.

**Job application form**

**Will you have a job application form? What do you need to include in your job application form? You can create this in Google Forms, Survey Monkey, or a similar free online service to help you simplify the application process.**

**Use this as a starting point and document each of your application fields here.**

Name

Address

Phone

Email

How many hours per week are you willing to work?

What’s your schedule availability?

What’s your salary goal?

* Primary income?
* Secondary income?
* Supplementary income?

**Interview questions**

**A successful interview is much more than the questions asked and answered. Consider: Was the candidate timely? What was their body language like? How did they dress? These factors should have weight in your decision-making. The following are potential questions to ask your candidates. Edit and make them your own, depending on the role and your business.**

**Potential questions for all candidates:**

* Tell me about yourself.
* Tell me what you know about our business.
* Have you received any of our services? What was your experience like?
* What made you want to apply for this role?
* Do you like working with people?
* Tell me about your XXX history and experience.
* How long would you like to work here? (Ideally more than a year)
* What is your preferred schedule?
* When are you available to start?
* Should you get hired here, are you interested in evolving into other roles?

**Potential questions for front desk staff:**

* Give me an example of a bad customer service experience in a former job. What happened, and what you might do differently next time?
* Give me an example of how you are detail-oriented and/or good at multitasking.
* In your opinion, why do customers come to our business?
* A customer complains that a service was terrible, what would you do?
* You are scheduled to leave at 2 PM and your replacement doesn’t show up. What would you do?
* How many hours per week can you work? Can you work every other weekend, Saturday and Sunday? We organize the weekly schedule on a quarterly basis and the weekend schedule monthly.

**Potential questions for practitioners:**

* Tell me about your experience. Where did you get certified? How long have you been working as an acupuncturist/massage therapist/etc.? Where have you worked previously?
* Give me an example of a negative client experience, what happened and what you might do differently next time?
* Give me an example of how you interact with a new client.
* Role Play: I’m a client. I’m nervous about my first appointment. What should I do?
* A client complains that their appointment was terrible. What do you do?

**References**

**Use this template to request references from your candidates. Prioritize professional references to confirm his/her/their work habits, customer service skills, and overall experience.**

Professional reference:

Name:

Title:

Company name:

Phone number:

Email address:

May we contact this reference?

**Offer letter**

**A written offer letter formally confirms the specifics of employment and ensures the candidate agrees to all terms. Use this template as a loose structure for your offer letter.**

Job description:

Job title:

Starting date of employment:

Pay specifics:

Benefits information:

Acknowledgment of terms and policies (Your employee handbook, if applicable)

Statement of at-will employment:

Acknowledgement of offer:

***Example offer letter: Massage therapist***

Congratulations! We are thrilled to offer you the massage therapist position at Tea Tree Wellness. Your experience and personality are a perfect fit.

As a massage therapist, you will be responsible for client intake, setting up and tearing down the treatment room, upselling, communicating clearly and effectively with front desk and managerial staff, and taking payments quickly and accurately.

As we discussed, your starting date will be (date) and you will be available for appointments at least 20 hours on Tuesdays, Thursdays, and Sundays.

Your pay rate will start at 40% commission and work up to 50% within a year if all job requirements are met and you exceed customer satisfaction. You will be paid bi-monthly. Direct deposit is available.

As an employee, you will receive 30% off all treatments and products. You will also accrue paid sick time at one hour per 30 hours worked.

If you choose to accept this job offer, please sign this letter and return it at your earliest convenience.

With your signature, you acknowledge our core values. You also recognize that your employment with Tea Tree Wellness is at-will. This means your employment is subject to termination by you or Tea Tree Wellness, with or without cause, with or without notice, at any time.

**Documents and legal requirements**

**You’ve hired an employee. Use this section to list everything you need your employees to sign and/or provide. That way, nothing will get missed!**

**Important: Use this section as a starting point. Always consult with your lawyer to confirm all necessary documentation.**

Forms for *all* new candidates:

* Signed offer letter
* Signed contract and employee handbook/policies

If considered an employee:

* W-4
* I-9 documentation

If considered an Independent Contractor:

* W-9
* Copies of insurance
* Business license

**Training Process**

**Document the steps you will take to properly onboard a member of your team. Adjust and add to as needed.**

* Receive signed forms/legal documents
* Review job description and responsibilities
* Review and reiterate employee policies
* Introduce other team-members
* Tour of the facility, including where additional equipment/product/cleaning supplies/merchandise backstock is stored
* Set up software logins and require completion of training
* Review clock-in and payroll procedures
* Review of schedule/work hours
* Provide keys and/or keycodes/security codes (if applicable)

**Operations manual**

**Your operations manual is a living, breathing document that outlines the day-to-day, business processes and policies employees need to know. Document them here.**

* What are your opening procedures? Closing procedures?
* How do you handle customer complaints/issues?
* What is your sales process?
* What safety policies do you have in place?
* What should happen in the case of an emergency? Do you have any specific procedures in place?

**Employee policies/handbook**

**Your employee policies/handbook includes information related to employee hours, payroll, benefits, and more. Document your employee-specific policies here.**

* What are your hours of operation?
* When and how should employees communicate with other members of your team?
* What is your payroll schedule?
* Do you have a promotion policy? If so, what is it?
* What is your dress code?
* How will you handle breaks? What happens if employees are late? How many tardies until they are on performance review and/or terminated?
* What happens if employees are sick?
* Are stylists/technicians responsible for managing substitutions? What is the process to find a replacement if need be?
* What kind of benefits will you provide? (Discounts, free services and products, etc.)
* What are your sales expectations? Do employees get rewarded for reaching their goals? Are there consequences if they do not?
* What are your policies regarding cell phone use?
* What do you expect with respect to social media?

**Termination checklist**

**As soon as an employee gives you notice, you should initiate the following tasks to help make turnover as simple as possible. Customize this checklist to your needs.**

* Schedule last check deposit
* Confirm keys, changing of alarm codes
* Delete logins and access to everything
* Schedule and conduct exit interview
* Post job
* Confirm training new hire, if applicable

**Exit interview questions**

**Good exit interview questions will help you learn what you may want to correct for your business moving forward. There are no right or wrong answers; this is your employee’s opportunity to give their honest feedback. Add/edit the following to fit your needs.**

**Potential exit interview questions:**

* What’s the address you’d like your W-4 to go to at the end of the year?
* Why are you leaving your job?
* What did you like best about your job?
* What did you like least about your job?
* Do you have any recommendations for us?
* Would you work for us again?
* Would you recommend us to prospective employees?
* Do you have any questions or additional comments?

During the exit interview, you’ll also want to be clear about what they can expect moving forward. For example:

* Your paycheck will be processed today and should deposit into your account about three days after your last shift.
* Your access to Mindbody and any other files and systems will be deactivated as of your last shift.
* Your discounts will be deactivated as of your last shift.
* If you’re interested in rehiring, contact the owner directly and keep an eye on our website and/or newsletter for hiring announcements.

***This plan is to be used for information purposes only and does not constitute legal, business, or tax advice. Each person should consult his or her own attorney, business advisor, or tax advisor with respect to matters referenced in this plan. Mindbody assumes no liability for actions taken in reliance upon the information contained herein. ©Mindbody 2020***