

People Planning Checklist for Small Business Success

1. Recruitment

- ☐ Defined the roles and responsibilities for each position
- ☐ Developed clear job descriptions and success profiles
- ☐ Created a consistent interview and selection process
- ☐ Assessed candidates for cultural *and* skill fit
- ☐ Established inclusive and diverse hiring practices
- ☐ Have a plan to promote vacancies (ads, referrals, platforms)

2. Remuneration

- ☐ Ensured wages meet or exceed legal minimums and industry benchmarks
- ☐ Reviewed and documented all employee entitlements (leave, super, bonuses)
- ☐ Set up a system for timely and accurate payroll processing
- ☐ Designed an incentive or reward system linked to performance
- ☐ Conducted regular remuneration reviews (annually or bi-annually)

3. Training & Development

- ☐ Onboarding plan for new hires (first day, first week, first month)
- ☐ Provided job-specific training and shadowing opportunities
- ☐ Offered ongoing learning (online modules, in-house sessions, workshops)
- ☐ Encouraged cross-training to build team flexibility
- ☐ Discussed development goals during performance check-ins

4. Performance Management

- ☐ Set clear expectations for performance and conduct
- ☐ Implemented regular feedback cycles (weekly/monthly check-ins)
- ☐ Used a simple performance review process (biannual or annual)
- ☐ Trained managers in giving constructive feedback
- ☐ Documented underperformance issues and improvement plans

5. Communication

- ☐ Scheduled regular team meetings and one-on-ones
- ☐ Communicated business goals and values clearly
- ☐ Shared updates consistently (new procedures, changes, successes)

- ☐ Created an open-door policy or feedback channel
- ☐ Reinforced core values through daily operations and recognition

6. Workplace Safety

- ☐ Completed WHS compliance training and documentation
- ☐ Assessed physical and psychosocial risks regularly
- ☐ Displayed emergency procedures and safety signage
- ☐ Provided necessary PPE and tools to staff
- ☐ Encouraged reporting of incidents, hazards, and near-misses

Bonus: Tracking & Improvement

- ☐ Set measurable people-related KPIs (e.g. turnover rate, absenteeism, engagement)
- ☐ Conducted regular employee satisfaction or pulse surveys
- ☐ Collected exit feedback to inform future improvements
- ☐ Updated people plan annually or after major changes