Building your Dream Team Worksheet (Staffing Checklist)

People are the most important component of a successful business. Great people can make a mediocre product a success. But mediocre people cannot make a great product a success. Below are guidelines that are common across industries. Customize the worksheet to fit your needs if your business is in a specialized industry.

**Staffing Plan**

You will need competent and experienced staff in executive management roles and below are some examples. Most will oversee a department or two. Fill in the blanks with names of identified or target candidates – you will likely be in the CEO role or one of the other slots. There will also be Vice Presidents who manage the functional areas in the next section.

CEO (Chief Executive Officer / “Cash Extraction Officer”) _____________________________
CFO (Chief Financial Officer)  __________________________________________________
CTO (Chief Technical Officer) __________________________________________________
CMO (Chief Marketing Officer) ________________________________________________

Most companies will require the following functional departments, however, there may be overlap in one or two of these areas. Put a check next to the ones you need to build.

- Engineering
- Marketing
- Finance
- Other ____________________________
- Sales
- Business Development
- Customer Service

Estimate your staffing requirements by quarter. Map it to company target milestones (e.g. product releases) and break it down by department or function. You should identify estimated salary requirements in the staffing plan and map them into the funding requirements plan. Fill in the boxes with the estimated number of staff required per quarter for the first 3 years of your business.

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<th>Year</th>
<th>Q1 Target</th>
<th>Q2 Target</th>
<th>Q3 Target</th>
<th>Q4 Target</th>
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<td>Year 3</td>
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**How to find your dream team**

Source candidates through your:
- Network / Rolodex
- Existing team members, advisory board and board members
- At events and seminars, everywhere you go
- Online resources – e.g. Craigs List, Elance
- Recruiters

**Interviewing Guidelines**

Develop an interviewing guideline for all interviewers and get feedback from all interviewers.

Before an offer is made, get at least 6 references (2 peers, 2 former supervisors, 2 direct reports). Also, do your own “backchannel” reference checking. Refer to the “How to Build Your Dream Team” session for more on backchannel references.

**Staffing Checklist**

KEY: Choose wisely (consider smarts, pedigree, commitment, and teaming capability)

Everyone you hire should fit into one of these categories. Fill in the names and titles of those identified and hired in one of these four categories:

1. **Visionaries:** envision and “see” the future of the products or services of your company as well as new markets you should enter
   
   _______________________________________
   
   _______________________________________
   
   _______________________________________

2. **Leaders:** in executive management and scattered throughout the ranks (includes the CEO and managers)
   
   _______________________________________
   
   _______________________________________
   
   _______________________________________

3. **Implementers:** people who “make things happen” by building the products or services and market and selling them (includes Sales, Marketing, and Technology people)
   
   _______________________________________
   
   _______________________________________
   
   _______________________________________
4. Infrastructure Builders and Supporters: create the foundation, processes and procedures of your company to keep it running smoothly (includes Operations, Human Resources, and Accounting) ______________________________________________________________
________________________________________________________________________

For more information on Building Your Dream Team, see Christine Comaford-Lynch’s book Rules for Renegades (McGraw-Hill, Summer 2007).