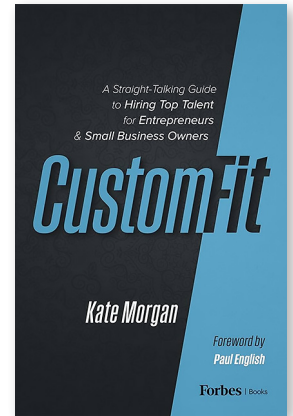


Executive Book Summaries®

Custom-Fit

A Straight-Talking Guide to Hiring Top Talent for Entrepreneurs & Small Business Owners

by **Kate Morgan**



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THE SUMMARY IN BRIEF

A single bad hire can drain a small business of time, money, and momentum; sometimes setting growth back months or even years. In lean organizations, every employee plays a critical role, so the wrong fit isn't just an inconvenience; it can cause catastrophic damage. That's why small business owners need a hiring process built specifically for their unique size, culture, and growth stage; one that reduces risk, avoids costly missteps, and ensures each new hire truly contributes to the company's success.

In *Custom-Fit: A Straight-Talking Guide to Hiring Top Talent for Entrepreneurs & Small Business Owners*, Kate Morgan delivers exactly that. Drawing on over 25 years as a talent acquisition expert and founder of Boston Human Capital Partners, she provides a practical, no-nonsense framework for developing a "custom-fit" hiring system that works for companies with fewer than 25 employees.

Morgan blends emotional intelligence with data-driven decision-making, helping founders align hires with core values, design insightful interviews, and create a hiring plan that fuels long-term growth. Packed with candid stories and actionable strategies, this book shows entrepreneurs how to hire smarter, faster, and with greater confidence.

IN THIS EXECUTIVE BOOK SUMMARY:

- Learn how to define your company's core values and use them as a hiring compass.
- Understand how to structure interviews to reveal candidate potential beyond résumés.
- Build a hiring plan that fits your size, resources, and growth stage.
- Avoid costly mis-hires by learning from real-world hiring successes and failures.

INTRODUCTION

As entrepreneurs, we have an innate, heightened sense of responsibility and purpose. We want to change, improve, and develop products and services that will improve the world. We aren't on this world to roll with the status quo – we want to create a greater impact. Of course, that also comes with its own unique set of challenges – otherwise known as *people*.

Hire wisely, and your team will create a competitive advantage in your market. But hiring even one bad apple can keep you awake at night, drive you to drink, and question the validity of your sanity. This is why, the sooner you can establish sound hiring practices, the greater our chance of success.

Your company is special, and you need to promote its uniqueness because one size doesn't fit all when it comes to people. The more unique or special your culture, product, or services are, the more you need to celebrate that uniqueness through upping yourself in the game of finding the right talent. You need a custom-fit approach.

CHAPTER 1

The Peopleing Paradox: Dealing with the Feels When Building Your Dream Team

A fundamental truth about entrepreneurship is that there is nothing more emotionally charged than the human side of your business. Your employees – your human capital – can be your greatest joy and your biggest headache, often within the same day.

Human Capital

When we operate companies, we function on two levels: the strategic side and the tactical side. When we think of our people, and we have high emotional intelligence, those sides could start to blur.

My goal is to help put lines in place so you can make solid decisions for the betterment of your organization as a whole while giving your employees the best opportunity for success even before you hire them. This is when “business-ing” and “peopleing” go hand in hand, and it's especially true when it comes to hiring.

The Costs of Hiring

Regardless of the size and stage of a company, getting hiring right is critical. The cost associated with a bad hire

in a start-up or small company will be monetarily compromising but, more significantly, a royal pain in the ass on an emotional level.

To quantify what a bad hire can cost, calculate the:

- Time it takes to find a replacement
- Cost associated with finding a candidate
- Time lost in getting a new person up to speed
- Low team morale when someone leaves
- Cost for shoddy work performed by teams with low morale
- Legal costs

Add the costs directly tied to recruiting, salary plus benefits, and training. Then consider the costs associated with lost time, schedule slips, direct impact on clients and customers, and going through the recruiting process again, which takes up more time and resources. Pretty serious math, right?

Hiring Plans

The old adage of “hire slow, fire fast” tends to be easier said than done when you're running a small business. Having a well-thought-out hiring plan in place will help you immensely.

Here are some key reasons why a hiring plan is crucial:

- **Competitive advantage**
- **Proactive planning**
- **Employee well-being**

WHEN TO IMPLEMENT A HIRING PLAN

The first step in developing a hiring plan is understanding how your hiring should align with the timing of your business objectives and goals ascertainment. A hiring plan is *not* the recruiting process; it simply outlines the levers that align with your business plan in order to help you think through when you hire and for what roles. Timing plays a big role, and a good hiring plan will have milestones in place that follow your business and financial growth.

The Requisition Process as Part of the Hiring Plan

A way for your team to start to understand that you are serious about hiring and that you want to approach it with a sense of purpose is through creating a requisition process. This is done even before the job description is created. You can think of the requisition as structuring data to legitimize the cost of hiring someone and the direct impact on your bottom line.

When establishing core values, understand that these will be the basis for your cultural edict—the norms for how your team members will fundamentally operate with one another.

Here are some quick steps on how to create a requisition process:

1. **Create a brief overview of the primary duties and responsibilities of the role.**
2. **Create the justification for adding a person to fulfill the role.**
3. **Identify the job title.**
4. **Provide a salary range.**
5. **Add approvals that include all parties involved.**

CHAPTER 2

Tailoring Your Culture Through Core Values

Authentic Core Values

The likelihood of a culture creating a thriving company increases exponentially when you invest the time and care into developing your unique core values. Your authentic core values are also indicators of what candidates will need to possess to be successful in your organization. Hiring people who embody your core values ensures your culture's staying power.

When establishing core values, understand that these will be the basis for your cultural edict—the norms for how your team members will fundamentally operate with one another. If you embrace your core values and hire and fire to them, you will have a clear path to your cultural edict. In time and with consistency, your edict will evolve into your company ethos.

Defining Your Core Values

In Gino Wickman's book *Traction*, he provides an exercise to help you define your core values. The exercise begins with identifying three people who stand out to you. Then, list as many attributes as you can for each person that stands out. After that, narrow the list to three to seven core values.

Gino encourages you to think about them for thirty days before really settling on them. The reason for this wait time is that the interpretation of words can be nuanced, and if

you want to be crystal clear on your message, you need to be “wicked” confident that they are delivering with impact.

Hiring on Core Values

Once you feel confident in having defined and communicated your core values, you'll start to incorporate them into your interview process. If candidates have those core values intrinsically, we know they possess the foundation to become custom-fit team members, allowing us to train them quickly and efficiently.

CHAPTER 3

Job Descriptions: The Blueprint for Your Competitive Advantage

The job description is an opportunity for people to get a peek under the hood of your organization from a candidate's perspective. A well-written job description helps people get a better feel for who you are and who they will be in your organization, if they are selected for the role.

JOB DESCRIPTION PREP

Before you write the job description, here's a few critical considerations to think about:

- Internal considerations:
 - Hone in on exactly what problem your company needs to solve.
 - Have true clarity on what success means.
 - Calibrate your team on who and how to interview.
- External considerations:
 - Clarity around what it means to work for your organization – adherence to your core values.
 - Help your candidates understand the challenges you are asking them to take on.
 - Understand how they will be measured once they are hired.
 - Provide a vision of how they will impact your organization.

The Success-Staged Approach to Job Descriptions

Success Staging is a more comprehensive way to think about a job description. Just as you might have thought about your company's business plan when you were first launching, thinking through a position should have the same care in developing the goals and vision. The most critical piece in Success Staging is knowing what entrepreneurs want the person to accomplish over the next three, six, nine, and twelve months.

JOB DESCRIPTION STRUCTURE:

1. **THE COMPANY** – An overview of the company; if you have an “About” section on your website, you already have this content; simply tweak it and use it in your job postings.
2. **THE POSITION** – Think of the position summary as your pitch to a candidate; it should focus on why the role is integral to your operations.
3. **PRIMARY OBJECTIVES – IN INCREMENTS** – The most important aspect of this part of the job description is outlining the role's expectations over a twelve-month period, broken down into specific time increments.
4. **KEY CHALLENGES** – No job is perfect, so talk through what some of the challenges look like. Be candid. Do not gloss over these points.
5. **HOW SUCCESS WILL BE MEASURED** – Explain what accountability looks like by providing specifics to how and individual will be measured, giving a behind-the-scenes view on expectations. This is key for a candidate to know in order for them to determine if they are up for the task.
6. **REQUIRED SKILLS AND EXPERIENCE** – Be careful you aren't suddenly turning this into a hunt for a unicorn. If you have laid out expectations clearly over a timeline, it should make sense why skills and experience come into play since you are breaking it down to more specifics.

CHAPTER 4

HiPOs: Unconventional Strategies for Finding Custom-Fit, High-Potential Employees

If you want to unseat your competitors and take your business to the next level, you need to hire people with high

potential (HiPO). This will mean taking a holistic hiring approach to find people who are a culture fit and deliver results. The irony of trying to find these HiPOs? These are the very people who are often overlooked.

When we survive tragedies and severe hardships, we can develop mental resilience, which is a key attribute of HiPO employees – those people who will go into any market, any economy, and will outperform their peers time and time again. These employees are the ones who will be ready to tackle anything as long as you give them support, respect, and encouragement.

There is no direct correlation between success and someone with a degree from a highly regarded school versus someone coming out of a letter school – or without a degree. The Ivy League school someone attends might give them access to people in high places within big companies, but it won't grant them an instinct for action.

As a leader, you owe it to your business and the employees to focus more on looking outside the box while relying on your core values to evolve your ability to determine who is an HiPO.

Your HiPO Hiring Action Plan:

1. Rethink your hiring criteria
2. Implement work product assessments
3. Adopt the business plan approach for executive and more strategic hires
4. Train your hiring team
5. Look beyond traditional backgrounds

Remember, finding HiPOs isn't about checking boxes on a résumé. It's about identifying people who are *your* custom-fit. You're looking for people who have that special blend of resilience, drive, and ability to get things done.

CHAPTER 5

Letting Go to Level Up: Making the Shift from Solo to CEO

Moving from being an independent contractor to an employer is an emotionally complex journey. Before taking this significant step, stop and ask yourself:

- Can someone else deliver the quality of work your clients expect, and are you ready to trust them to do so?

Remember, finding HiPOs isn't about checking boxes on a résumé. It's about identifying people who are *your* custom-fit. You're looking for people who have that special blend of resilience, drive, and ability to get things done.

- Do you have the mindset and skills to be an effective leader rather than just a talented individual contributor?
- Are you prepared to step back from hands-on client work to focus on strategic business growth?
- Can you let go of the tasty dose of dopamine that comes from directly serving your clients and solving their problems?
- Are you ready to find satisfaction in your team's successes rather than your own tactical wins?

Progress over Perfection

Shifting from solopreneur to entrepreneur is not easy, but the rewards are tremendous. You will experience the thrill of the build and all the impact you'll have on those you employ and the customers you service. And as you stretch outside of your comfort zone, you will grow personally and professionally. But before that happens, there are additional hurdles you'll need to overcome. Perfectionism is one of them.

Perfectionism and the need for control are intertwined. They both stem from our fear of letting go and then failing. The problem with perfectionism and needing control is you will drive your employees away or drive them into paralysis as they submit to their fears of failure.

Custom-Fit Your Foundation: Your Playbook

A playbook helps build the trust that someone else can deliver the quality of work your clients expect. Teach your people your processes and methodologies, but also allow some flexibility for the nuances. Your playbook is where you outline those processes and methodologies. This will contain your "secret sauce" for success with your clients and help ensure your team operates to your identified standards.

CHAPTER 6

Hiring Your Game Changer: Operations

Hiring an operations person isn't a luxury—it's a strategic necessity. Yes, it's overhead. Yes, it stings financially. But trying to do it all yourself is like putting your business in a

chokehold. Unless you enjoy this part of business, you're not being "fiscally responsible" by handling operations yourself—you're actually limiting your company's growth potential and probably doing a mediocre job of both operations and strategy.

What to Look for in Your Operations Manager

To find an operations person who is custom-fit to your organization, you'll do well by applying the takeaways on Success Staging your job description. Consider these initial questions:

- What is the vision for the role?
- What impact does the role have on the company?
- Without having this role, how does it negatively impact your company?
- Who will they interact with – what people (by title) and/or departments?
- What type of person do you want to attract?
- What are the unique challenges they will be faced with?

CHAPTER 7

The Tailored Trailblazer: Your First Sales Hire

Finding the right person to lead your sales activities can make or break your start-up. They still need to possess your core values and be able to deliver on expectations for the role. And they'll certainly have to have that "instinct for action." But to successfully hire your first salesperson, you will need to have a deeper understanding of the role overall on a more intimate level.

There are two things you need to have in place before you start interviewing for your sales position: what type of person you are looking for and having a compensation plan in place.

Who to Look For

Here's what you need in your first sales hire:

1. Vision and core values

2. **Entrepreneurial-minded**
3. **Emotionally stable**
4. **Understand the market**
5. **Technical chops**

Here are two things to avoid when considering your first sales hire:

1. **Money-driven**
2. **Large organization experience**

Culture, too, will play a role in whether they will be a fit. Again, it is our responsibility to be true to our process. Interview objectively and make sure that you have them present a business plan.

Compensation: Setting Everyone Up for Success

Compensation planning needs to start with realistic – if not conservative – estimates of your sales cycle length.

One effective approach is implementing a base salary plus bonus structure tied to miles by objective (MBOs). If MBOs don't sit right with you, another compensation option is to consider non-recoverable draws and recoverable draws to get your new sales rep up to speed. A draw is simply a commission that is given to keep a person closed to “whole” on their on-target earnings.

Consider adjusting commission rates based on the type of sale:

1. **For existing customers (easier sales):**
 - Set the commission rate closer to 20 percent
2. **For new clients (more challenging sales):**
 - Set the commission rate closer to 30 percent

CHAPTER 8

Reference Strategies: The Final Fitting

Reference checks often get treated like a box-checking exercise at best, or dismissed as worthless at worst. But here's the thing: if you're doing reference checks just to confirm someone worked where they said they did, you're missing the point entirely. Reference checks aren't about getting a thumbs-up or thumbs-down—they're about understanding what environment will help your potential hire thrive.

Your reference-checking goals and techniques should be determined before you hold the call with the reference. With those – and your key questions queued up – you'll have a solid strategy in place for this final stage in your hiring process.

ESSENTIAL QUESTIONS

- How long did you work with the candidate?
- What was your relationship with the candidate?
- How do you rate their ability to comprehend, analyze, and solve problems?
- How do they respond to crises? What is their response time, communication, and creative resolution in those situations?
- Do they work better collaboratively or independently?
- Did they meet or exceed expectations? Where can they improve?
- What organizational attributes help them succeed?
- How do they handle new situations with limited knowledge?
- What's your most memorable experience with them?
- Would you hire/work with them again?
- Is there anything else a company considering hiring this candidate should know in order to help the candidate be most successful?

CHAPTER 9

Breaking Up Is Hard to Do

You pour your heart and soul into finding the right person, and you think you've nailed it. Then, reality hits. The star candidate who wowed you in the interview? Maybe they're not so shiny when they actually start working. Perhaps they're just not cutting it performance-wise, or maybe they're bringing a toxic attitude that's dragging everyone else down.

Here's where a lot of entrepreneurs get stuck: they know they need to fire the person, but they keep putting it off. They may be worried about the hassle of hiring and training someone new, or they're afraid of conflict.

Once you do make that decision and act on it, you'll see it was similar to any bad relationship. You will realize that there were many aspects and layers you were unhappy with but you dealt with them in hopes things might get better.

To Fire or Not to Fire

Here is a pretty simple, black-and-white chart of legal and illegal reasons to let someone go. If you're dealing with something you believe is in the gray, do not hesitate to get in touch with an attorney.

Legal Reasons

- Difficult/combatative interaction
- Ineffective at their job
- Tardiness/attendance
- Substance abuse
- Falsifying records
- Using company resources for personal benefits

Illegal Reasons

- Sexual orientation/gender
- Race, religion, etc.
- Retaliatory/whistleblower
- Pregnancy
- Physical/mental disability
- Related to Family and Medical Leave Act

It is imperative that you monitor your employees' performance against your core values in order to maintain the highest standards. Addressing performance issues early can lead to improvements or amicable separations. And while it can be tough sometimes, it is critical to get comfortable with transparency and conflict when managing people.

ACKNOWLEDGMENTS

Whether you're an entrepreneur striving to build something extraordinary or a leader determined to create a team that truly fits your vision and core values—thank you. Your dedication to doing things differently, to seeking not just the best talent but the right talent, is inspiring. This work exists because of people like you, who believe in the power of intentionality and the ripple effect it can create. I hope these pages spark new ideas, reaffirm your purpose, and remind you that building a dream team isn't just about business—it's about creating something meaningful.



Kate Morgan, founder of Boston Human Capital Partners, is a talent acquisition expert with over 20 years of experience helping small business leaders—particularly those with fewer than 25 employees—hire strategically, build resilient teams, and align new hires with core values. Known for her candid, practical approach outlined in *Custom-Fit*, she blends emotional intelligence with data-driven insights to help entrepreneurs avoid hiring pitfalls, foster authentic workplace cultures, and drive long-term success. Drawing on her own entrepreneurial journey, Morgan supports companies across industries, from VC-backed to owner-operated, while also mentoring future business leaders. A Boston native, she lives with her husband, Rob, and enjoys cultural exploration and visiting her daughter in San Francisco.

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