Community Business Development Corporation
Corporation au bénéfice du développement communautaire

Business financing, support and advice • Financement, aide et conseils aux entreprises

CBDC Onboarding Course

Part 1 Lesson 2

Atlantic Canada Opportunities Agency

Agence de promotion économique du Canada atlantique

Canada

Part 1/4
Lesson 2/2

Learning outcome 1: Managers are able to determine the activities necessary to develop an effective onboarding plan.

> Learning outcome 1A: Define onboarding.
> Learning outcome 1B: Distinguish between onboarding, training, and orientation.
> Learning outcome 1C: Describe the steps in an onboarding plan.
> Learning outcome 1D: Explain the importance of onboarding.

Developing an onboarding plan – this section covers what an onboarding plan is, what it isn't, best practices for designing an onboarding plan and practical examples.

> 1.   What is an onboarding plan?
> 2.   What are some things people often confuse with an onboarding plan?
> 3.   How do you develop an onboarding plan?
> 4.   What are some onboarding considerations?

What is an onboarding plan?

Onboarding is the process of bringing a new individual into your organization and the steps you take to facilitate the process of integrating them into your organizational culture and assisting them to become productive members of the team.

The term onboarding encompasses all the activities you undertake to develop a new member of your organization until they're able to perform their duties in accordance with their job description.

Onboarding includes orientation and training, but these are different things. Onboarding is the overall process encompassing all the steps you take to get a new member of your organization to full functionality, this can include but is not limited to administrative procedures, licensing, orientation, training, supervision, and evaluation.

Understanding onboarding vs orientation vs training.

Onboarding, orientation and training are frequently confused as they're closely related, although not the same. An orientation and training should both be found within onboarding, however both orientation and training can exist and be done outside of onboarding.

Onboarding refers to the entire process of bringing a new individual into your organization, from the time you hire them until they become well-versed in their role within your organization, how your organization works and your organizational culture. This process will probably take weeks at the least, and could reasonably take months to complete. Within your onboarding process, you should include a

plan to provide orientation to your organization and workspace, relevant training, team integration, supervision, achieving effectiveness and performance review.

An orientation involves introducing an individual to your organization. This can include a physical walk-through of your workspace, sharing the history and vision of the organization to orient someone new to your organizational culture, and providing information systems and technical information to ensure new individuals understand your digital space as well. While orientations should always be a part of your onboarding plan, orientations can also be used outside of an onboarding process, such as on the first day of a course or when having visitors or contractors in your building.

After orientation, and as a component of your overall onboarding plan, you should have a training plan designed to help newcomers to become effective in their role at your organization. In some cases, you may be hiring at entry level and be expecting to provide a high degree of training, in others you're hiring an experienced professional, but you should not overlook necessary training to ensure all newcomers to your organization learn the basics of your process and culture.

To clarify these differences, diagram 1 demonstrates the sequence and overlap of orientation and training within the onboarding process. Throughout this course the learning material will explain orientation and training in further detail.

Diagram 1
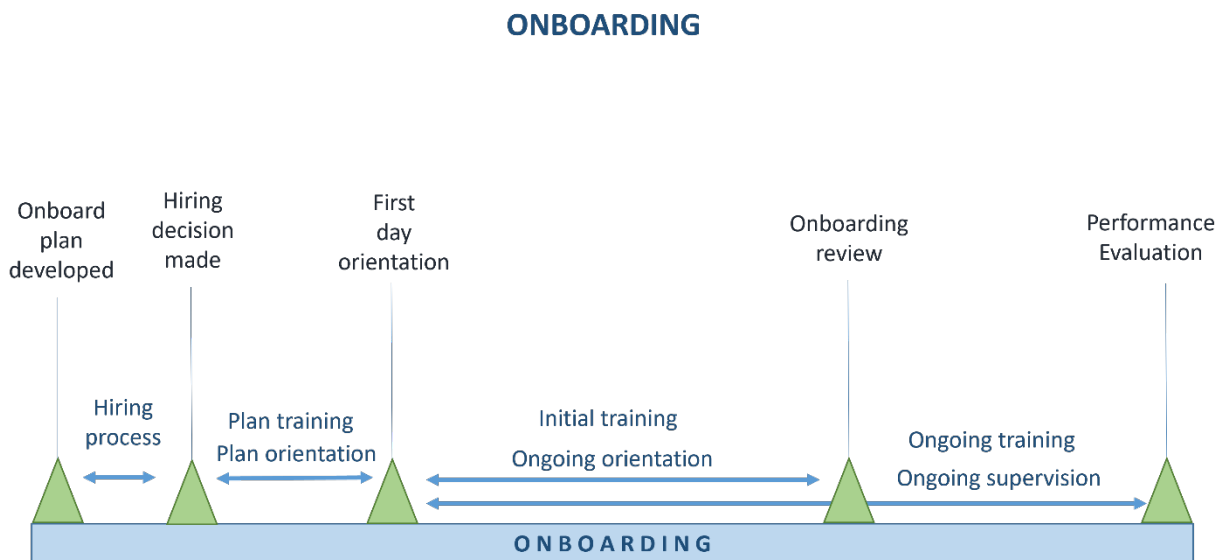
ONBOARDING

How do you develop an onboarding plan?

Developing an onboarding plan isn't a perfectly linear process. Using the resources provided in this course, you'll be able to sketch out the basics of what you need to do to welcome a new hire to your organization, but there will also be portions of your plan that get confirmed along the way and may change throughout the process.

It's important to keep in mind the overall goal of onboarding, which is to successfully integrate someone new into your organization, in an effective and efficient fashion; and to understand the three main components within onboarding, which are: the hiring process, the orientation, and training.

When developing your onboarding plan, you'll begin by determining whether you're making a time-based hiring decision, as in you need someone now, or need them to start at a certain date. You'll learn more in the next lesson outlining how to design a hiring process.

Resource Document 1 provides two templates for designing your onboarding plan, a simple checklist-based approach, and a detailed Onboarding Checklist that allows you to set dates and monitor your completion of onboarding activities.

Once you complete your initial Onboarding Checklist, you'll work through the remainder of the resource documents to ensure you have everything laid out to welcome your new employee into your organization. A completed onboarding plan will include your onboarding checklist, hiring process outline, effective job ad, effective job description written into your employee interview record form, a training plan, a completed orientation checklist, and a proposed after-action review outline.

What are some onboarding considerations?

Your onboarding plan should consider whether you're making a time sensitive hiring decision or hiring according to best job fit. This means, do you need to have someone in a role by a certain time, or are you keeping the hiring process open until exactly the right person comes along?

Another onboarding consideration is to be aware that's you're going to jump back and forth confirming different pieces of the plan until it all comes together. As you're completing your onboarding checklist, you'll also be putting together your training plan, and some training information will need to be confirmed before you can complete the training plan section of your onboarding checklist.

Always remember why onboarding is important. It's one of the first impressions a new employee will have of your business, you want to impress them, you want to train them right to ensure effective and efficient business operations and continuity, and you want to pass on a strong company culture.

Summary

In this section of the CBDC Onboarding Course we've covered what onboarding is and how training and orientation themselves frequently get confused for onboarding. We've explained why you should start planning your onboarding as you're developing your hiring process and covered how to develop an onboarding plan.