



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 2 Lesson 2



Atlantic Canada  
Opportunities  
Agency

Agence de  
promotion économique  
du Canada atlantique

Canada 

**Part 2/4**

**Lesson 2/2**

**Learning outcome 3:** Managers are able to develop a training plan based on their employee and organizational needs.

Learning outcome 3A: identify the importance of training plans.

Learning outcome 3B: Describe how to assess training needs.

Learning outcome 3C: Outline the components of a training plan.

**Designing a training plan** – this section explains the importance of having a training plan, how to assess training needs, the basic considerations for designing a training plan, and lays out the value of training.

- a. Why are training plans important?
- b. How do I assess training needs?
- c. What does my training plan need to contain?

**Why are training plans important?**

Training plans are important because they ensure you're wise about allocating training resources, both time and money, to their best advantage. They allow you to succession plan, ensure operations stay smooth and uninterrupted, allow you to plan for growth and to continually improve your team and thereby your business.

**How do I assess training needs?**

In basic terms, for the purposes of this training, you will assess training needs in two ways:

- a. First, by listing the equipment and processes your new employee will need to understand. This may be an oven, computer system or skill saw depending on your business. To do this you'll use the [process map](#) you created earlier in this training, as well as the job description outlining your employee's duties and tasks. Through a review of these documents, you can determine what training you need to provide to make your new employee capable to do their job. For example, if you work in an office:
  - i. Make a list of the office equipment the employee has to use such as the computer, printer and telephone.
  - ii. From there break the list down into any specific or different tasks they need to perform on the equipment.
  - iii. Finally, create notes, screen shots, or video explaining how to complete these tasks.
- b. Next, by listing what qualifications and skills your employee currently has and what qualifications or skills you need. Here, you may be planning for outside training or to send the new employee on specific courses to increase their knowledge or expertise to meet an organizational need. If you have a growth or succession plan you should consult it, to identify any qualification areas your business may be lacking.

### What does my training plan need to contain?

First, it is important to record and track personnel management and development. This ensures both parties are meeting their commitments and obligations to each other and can provide the documentation necessary to support decisions related to promotions, raises or disciplinary action. It can also contribute to data for business analytics. Ensure you have the basic information correct regarding the employee, their position, and the reporting period.

Using the [training plan template](#) contained in this course, you will refer to [your Employee Interview Record](#) which you've used to write your job description to list the qualifications and skills required for the position. This is the first component of your training plan, identifying the key qualifications and skills your employee needs.

From there, use your process maps and organization chart to **assign** the training required for the job. This will be anything *you* have determined your employee needs, this should include training on equipment and processes necessary for the jobs, as well as any additional qualifications or skills you want them to obtain.

In this section you can also make note of any **self-identified** training the employee would like to take. You can use this information to work collaboratively with your employee to develop solutions and efficiencies for your business and to increase retention as studies show providing training in your workplace is appreciated by employees and leads to greater job satisfaction.

When you have identified your employee's qualifications and skills gaps you can look at the internal and external methods you can use to provide that training and set a timeline for it to be done. This might look like having a more senior person on the team teach the new employee how to operate a specific piece of equipment or booking a first aid course. Having training requirements listed in this way can help you plan work schedules and business operations and provide important information to help you budget for necessary training.

The last portion of your training plan document allows you and your employee to both acknowledge what the plan is by signing.

### Summary

In this section of the CBDC Onboarding Course we've covered the importance of having a training plan, how to assess training needs, the basic considerations for designing a training plan, explains why developing an onboarding plan feels like reverse engineering, and lays out the value of training.