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 4 Lesson 2

Atlantic Canada Opportunities Agency

Agence de promotion économique du Canada atlantique

Canada

Part 4/4
Lesson 2/2

Conclusion – this section reviews what we've covered throughout the course, how it can help the manager and improve the organization and other areas for development and improvement the engaged manager may pursue.

   a. Designing an onboarding plan.
   b. Developing a hiring process.
   c. Designing a training plan.
   d. Employee orientation.
   e. Managing the onboarding process.
   f. Review, feedback, and continuous improvement.

Designing 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.

Developing a hiring process

The hiring "process" is creating a step-by-step guide that can be used consistently and apply to most if not all hiring situations when engaging a new employee. Having a hiring process will walk you through a progressive set of actions you need to take following best practices to hire on someone new.

The hiring process determines the role of new employees and is their first impression of you as an employer. Knowing what you need the new person to do is not only important for your organization, but will also enable you to properly structure your training to ensure you maintain efficient and effective operations by teaching the new hire how you manage processes at your organization.

Designing a training plan

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.

To create a training plan, you first need to assess training needs.

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.

Employee orientation

Employee orientation is familiarizing an employee with a new workplace, workspace, course, event or process. It involves providing basic information and guidance that can act as the foundation of understanding the environment the employee will be working in.

Managing the onboarding process

Communication is key to effective onboarding. You can talk through what the plan is with a supervisor to clarify that all the steps of the plan are in the right order, and to avoid missing any key safety, administrative or learning requirements. Having a conversation with the new employee's mentor to ensure everyone is on the same page for the orientation day and overall onboarding is important as well, so you can address any questions or concerns.

The great thing about a well-structured onboarding plan, is that it can walk you through the entire process with ease. Because when you're creating your onboarding plan you're moving back and forth between the individual steps, such as hiring, orientation, training and creating your overall onboarding plan, you're able to get a feel for the chronology of onboarding and move pieces around as you're creating the plan until it flows naturally from one step to the other, and all you have to do is follow the steps.

Review, feedback, and continuous improvement

Regularly reviewing any process in your business is important to ensure it still suits your needs and is still effective in achieving its purpose. Reviewing processes helps you to know what should be cut, changed or improved, and this will keep you competitive and moving forward.

Summary

In this section of the CBDC Onboarding Course we've reviewed what we've covered throughout the course, the importance of having an onboarding plan and how to create one, integrate your hiring process and do orientation and workplace training.

Don't feel pressure to implement every aspect of this course into your business immediately. There has been a lot of material covered in this course, and while developing a robust and comprehensive

onboarding process should be a goal, implementing even some of the recommendations, tips, and practices outlined in this course will result in improvements for your business.

If you've enjoyed this course and found it useful, please share it! And look for additional training resources on the CBDC Learning Library, including everything from how to set up Google My Business, to financial management basics.