

# Action Plan Step 6: Implementing a Plan of Action for Onboarding



You have newly hired a person in the area you supervise. Choose a job position with most employees in that position.

(e.g. housing specialist doing re-exams.)



**This is a generic plan of action for onboarding.  
Add other steps pertinent to their job duties.**

Remember to add in the HUD regulations and agency policies and forms (how are you going to teach them?) How are they going to learn to use the software (data entry, filing, what else?)

Remember that you are using a TELLING style. How will you know they are comprehending? How are you going to keep them active and not sitting, waiting for someone to tell them the next step? How often are you going to check in on them? How often are you going to meet with them to find out how they are doing? Are they going to job shadow?

Under each area, list the tasks.



# Month 1: Introduction & Familiarization

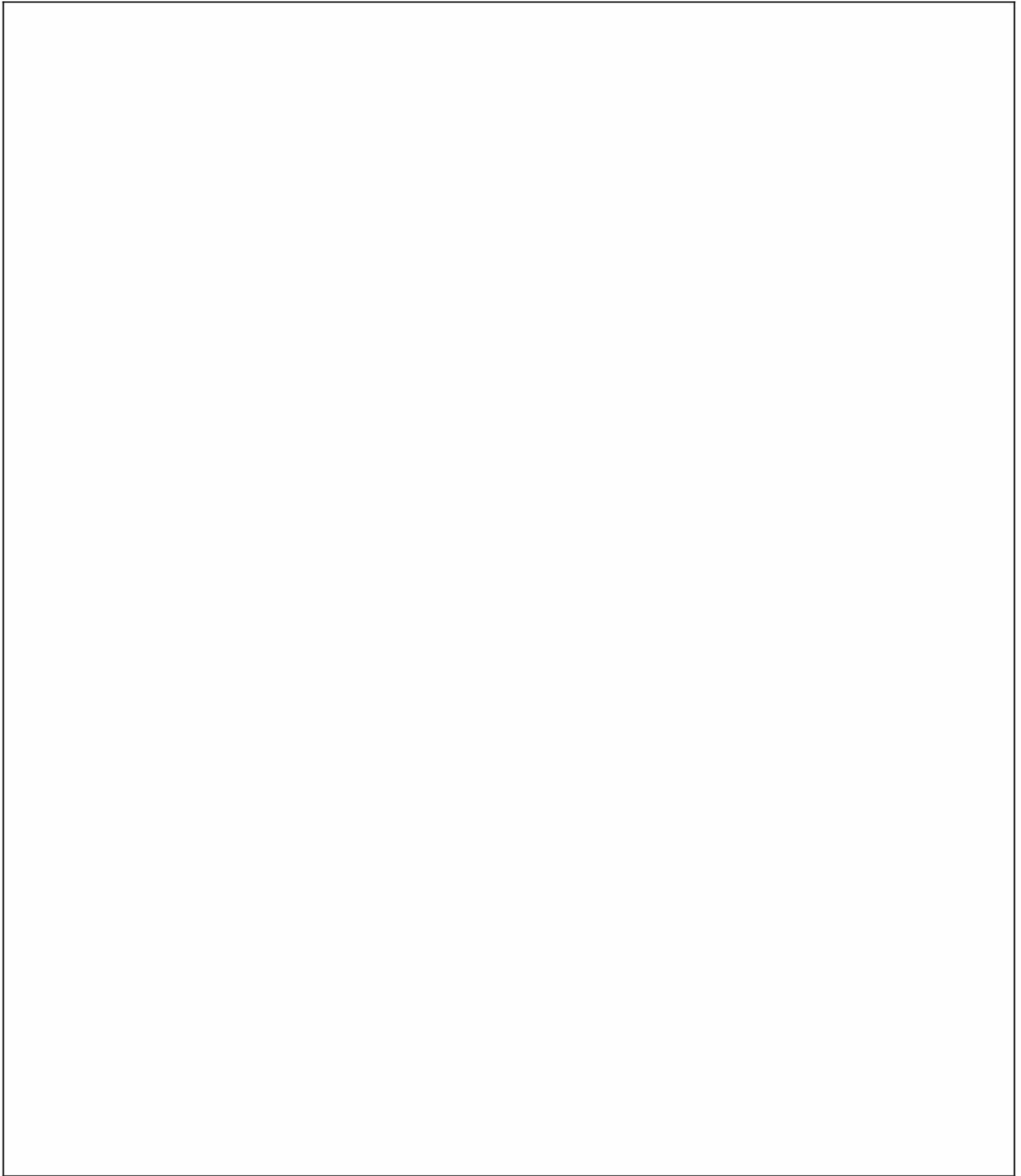
## 1. Week 1: Orientation & Introduction

### Day 1: Examples

- Welcome and introduction to the team. (“Meet the team at 9 a.m. in the conference room.”) What will happen in this meeting?
- Overview of company culture, values and mission. (“Attend the company overview session at 10:30 a.m.”) Who will present? What will they present? How long will they take?
- Provision of necessary tools and software. (“Collect your access badge and laptop from the IT department at 2 p.m. “) Where is the IT department? Have you coordinated with them? Are there documents you have to fill out? What else will they need?



# 1. Week 1: Orientation & Introduction



# Questions:

**What else will you have them do this day?**

**Who else will be involved?**

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**How are you going to keep them interested and not feel they are shut off in a corner to read?**



## Day 2-5:

- Introduction to the software used for data entry, filing and customer service.
- Overview of the annual and intern re-examination process.
- Initial meetings with team members and key stakeholders.





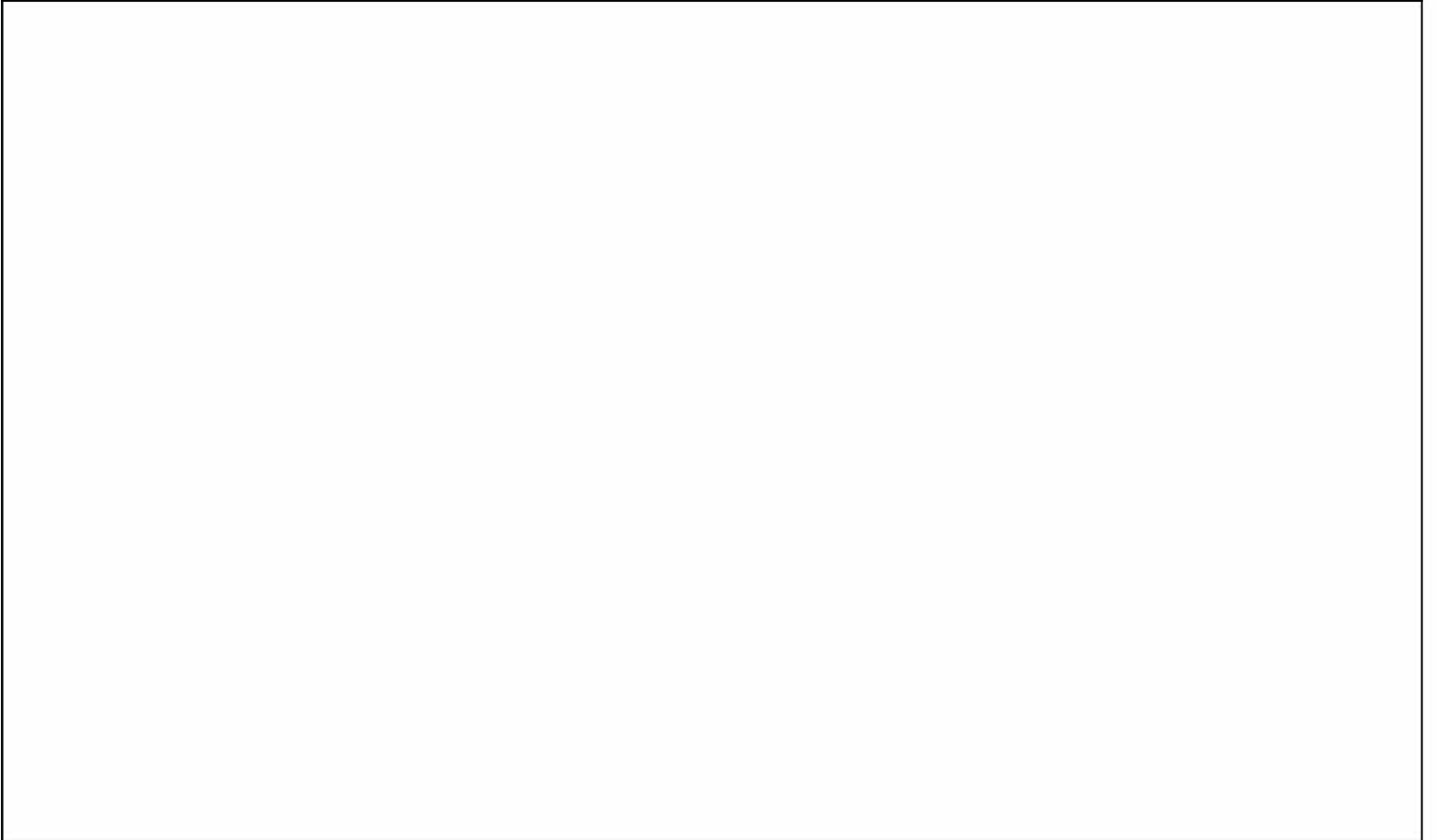
## 2. Week 2-4: Basic Training

- Hands-on training with the data entry software.
- Overview of data sources, formats and validation processes.
- Training on customer service protocols, communication tools and software.
- Training on filing systems and document management.



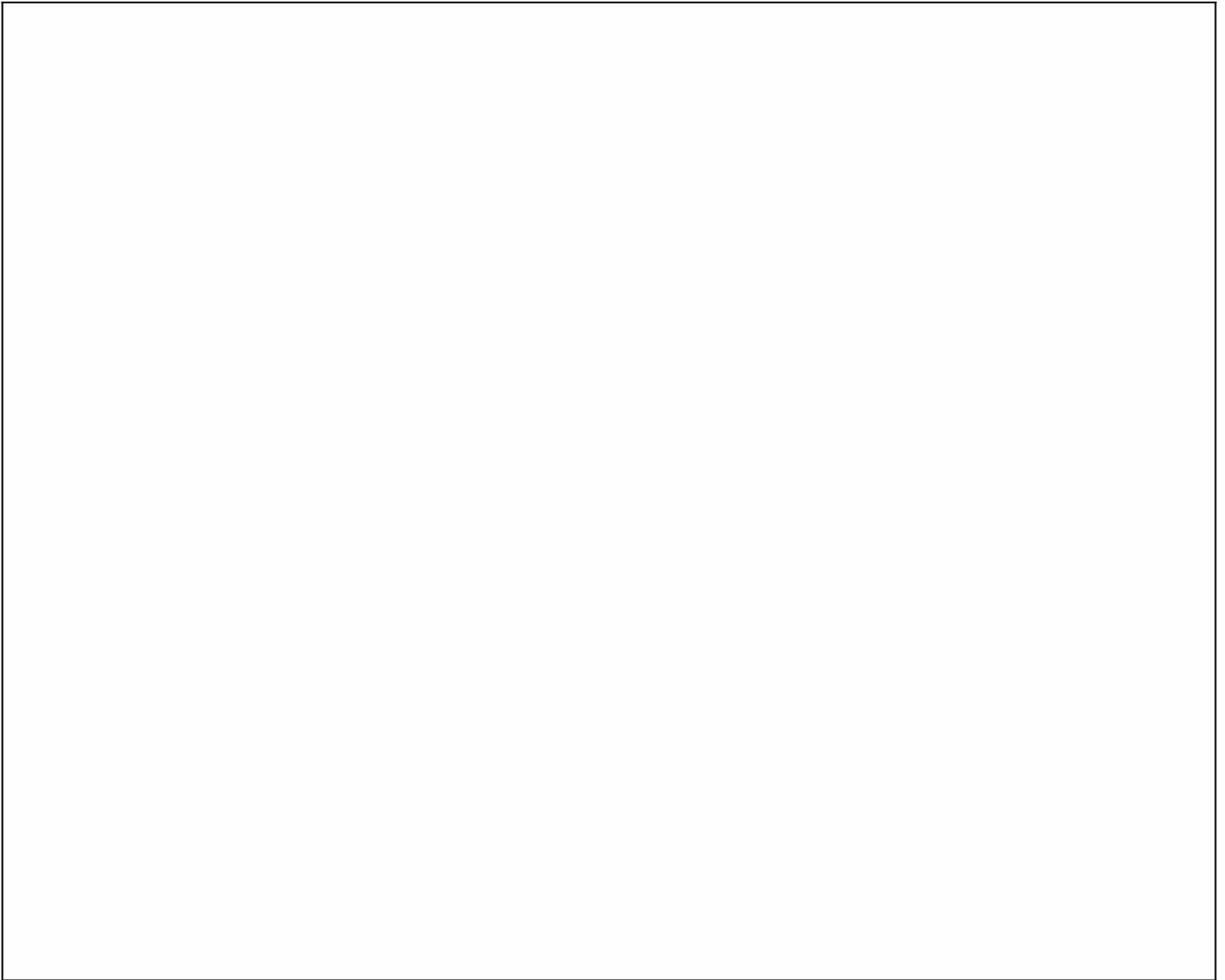
# Month 2: Advanced Training & Soft Skills

## 1. Week 1-2: Advanced Features & Protocols

- Delving deeper into the functionalities of the store.
  - Understanding advanced features and their relevance to the re-examination process.
  - Learning about data backup, security and confidentiality protocols.
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## 2. Week 3-4: Soft Skills Training

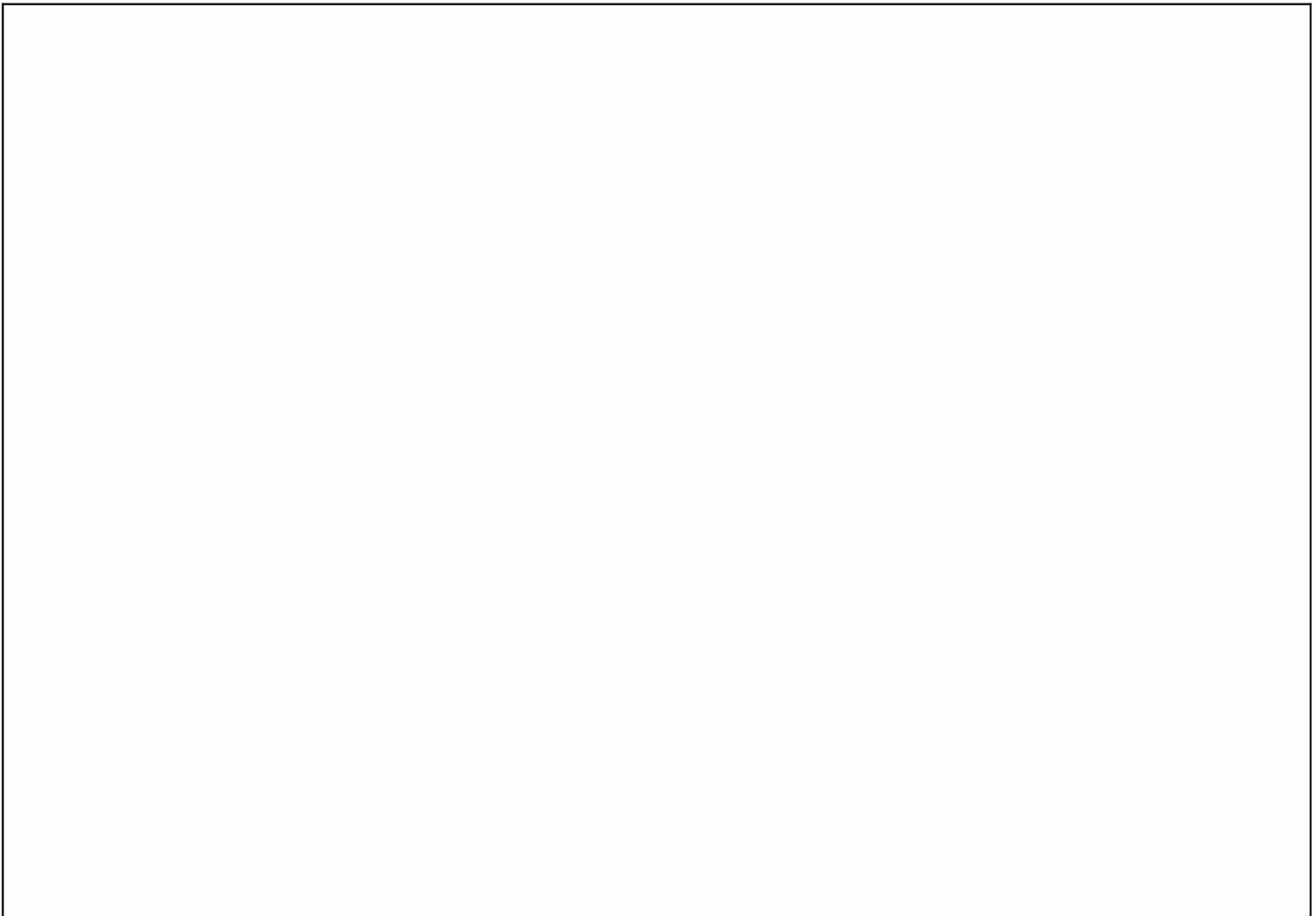
- Customer service training, including handling difficult situations, effective communication and empathy.
- Time management and task prioritization.
- Effective collaboration and teamwork.



# Month 3: Shadowing & Mentorship

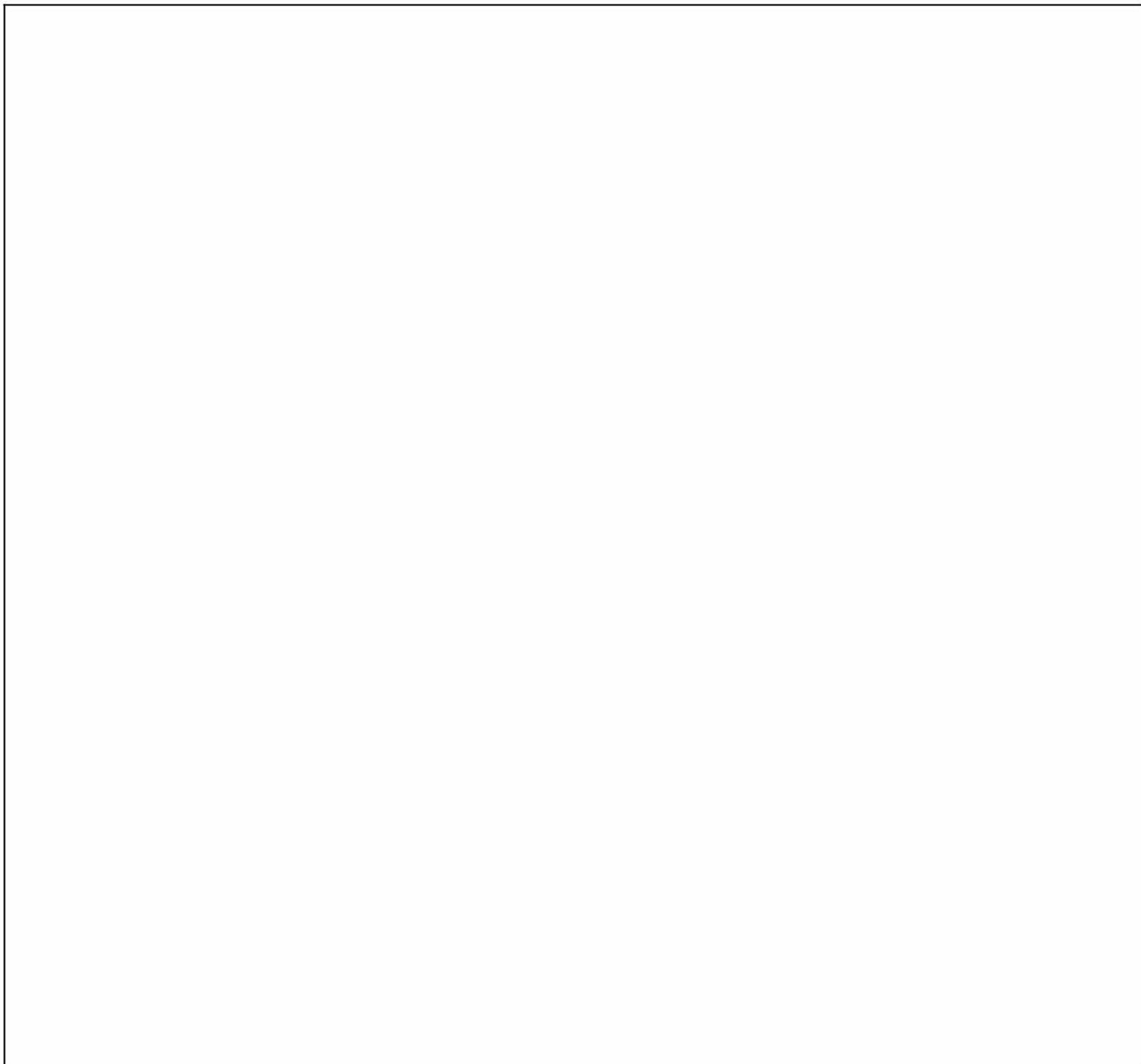
## 1. Week 1-2: Shadowing Experienced Employees

- Observing experienced team members during real tasks.
- Asking questions and gaining insights into best practice.



## 2. Week 3-4: Mentorship Program

- Assigning a mentor to guide and assist in understanding nuanced details and addressing challenges.



# Month 4: Hands-On Practice & Feedback

## 1. Week 1-4: Controlled Environment Tasks

- Giving tasks related to data entry and re-examinations in a controlled environment.
- Daily and weekly feedback sessions to highlight strengths and areas for improvement.



# Month 5: Integration & Real-World Tasks

## 1. Week 1-2: Slow integration to Real-World Tasks

- Assigning simpler real-world tasks.
- Regular check-ins to ensure confidence and competence.



## 2. Week 3-4: Full Integration

- Assigning regular tasks.
- Weekly feedback sessions and performance evaluations.





# Month 6: Evaluation & Long-Term Development


## 1. Week 1-2: Continued Work & Support

- Continuation of regular tasks.
- Providing additional training as needed.



## 2. Week 3-4: Performance Evaluation

- Comprehensive review of the employee's performance.
- Feedback on areas of excellence and areas for development.
- Discussion on long-term goals, additional training, or role adjustments.



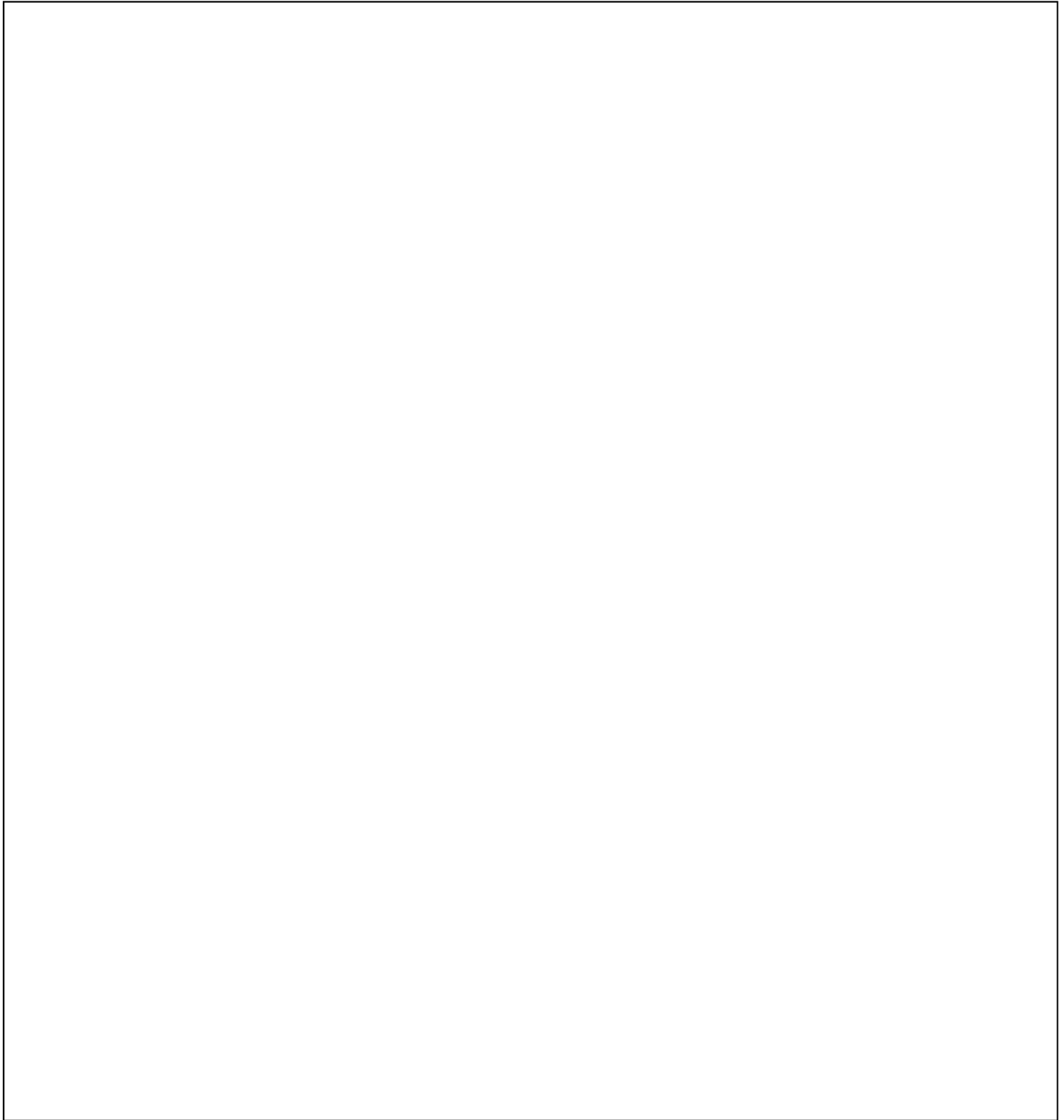
Remember, onboarding is not just about training an employee in tasks but also about making them feel a part of the organization. Regular check-ins, support, feedback, and encouragement are vital throughout the onboarding process.

**How long will you use the Telling style?**

**At what point will you switch to a Coaching style for some of the tasks?**

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**When you have switched to a Coaching style, why would you go back to the Telling style for tasks?**



**Complete the actions to be taken for the rest of the six months. When you finish this, you will have the outline of an Onboarding Plan. You should create one like this for every job you supervise.**

