

STREAMLINING AND DEFINING INDUCTION MADE THE PROCESS FOR NEW CONSULTANT ONBOARDING MUCH SMOOTHER

In 2018 a client requested a review of the way their induction processes were managed. This was in part due to steps being missed in the induction process and a dependency on leadership to drive the process forward.

CHALLENGE: The consultants inducted were known, trusted and therefore the process of induction was generally informal and managed mostly by a signatory staff member within the company's leadership. The induction process was developed within a small team of people and dependent mostly on management driving the process forward than the inductee being responsible for their own elements of induction.

As new opportunities arose, the business was growing and the signatory staff member passed on more of the induction process to administrative support. Many of the induction elements were still often being dealt with informally.

The goal was to create a formalised process for induction that took the pressure off the staff member and made sure induction happened smoothly and consistently.

INSIGHTS: The process responsibilities were removed from the signed signatory staff for two main reasons: (1) they didn't have time to track when a consultant didn't follow up on a delivery they had been asked for such as a document or action; and (2) they didn't need to be involved in at least 90% of the actions.

The shift put the ownership back on administrative management, rather than being management led. It took the pressure off one primary person and spread the responsibility more towards the inductee to provide their information in a more timely manner.

Implementation was done on a trial manner with two new inductees. They were asked to provide feedback on how their induction was managed throughout the process. From the evaluation of this feedback

the changes were officially signed off by leadership and rolled out as the new official process for induction.

It took time to get consistency by leadership to follow the new processes in place. This involved the team not shortcutting any of the steps or taking on tasks themselves that were not theirs to handle. Although there was support, procedure breakdowns were common in the first six months of rollout.

SOLUTION: By streamlining the structure and the administration team taking ownership of the process, it has led to a smoother, more transparent process for inductions and consultant onboarding.

The team has been able to release their control of the induction process and as a result, trust administration to manage the process and only involve them at points of authorisation as has been agreed.

An example of this is where contracts were being sent out to new inductees by leadership and not adequately tracked. Weeks would pass and there would be no clear awareness of the new person was not actually contracted but had been put on task potentially by others in the leadership team. By administration tracking this step more formally, any delays in receiving contracts were discussed at weekly meetings and acted upon in a timely manner.

Another example related to the financial implications of bringing a new person on board. The company provided an email account and branded materials to those who represented the company in a more in-depth way. During the induction review, we discovered money was being allocated to consultants who did not need the resources that were being provided and paid for. We identified three levels to define which consultants required financial outlay and which did not and used this identifier to bypass steps as required within the induction process.

By reviewing and restructuring induction, it has meant that new consultants have a smooth transition into the business and all the appropriate steps are followed in a consistent, authorised and organised manner with minimal interruption to leadership.