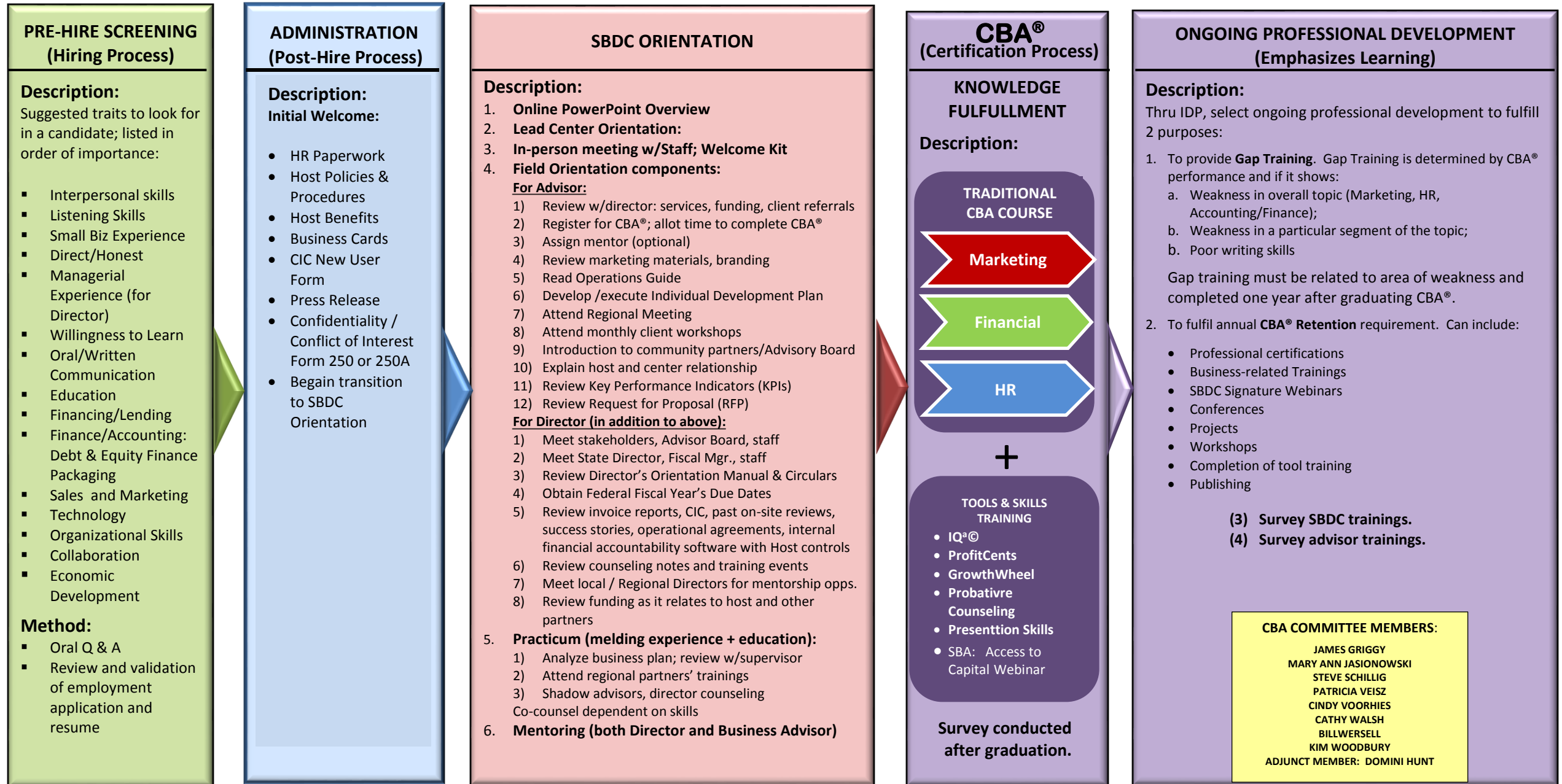


# Ohio SBDC's Onboarding Pillars of Professional Development



## PRE-HIRE SCREENING (Hiring Process)

### Description:

Suggested traits to look for in a candidate; listed in order of importance:

- Interpersonal skills
- Listening Skills
- Small Biz Experience
- Direct/Honest
- Managerial Experience (for Director)
- Willingness to Learn
- Oral/Written Communication
- Education
- Financing/Lending
- Finance/Accounting: Debt & Equity Finance Packaging
- Sales and Marketing
- Technology
- Organizational Skills
- Collaboration
- Economic Development

### Method:

- Oral Q & A
- Review and validation of employment application and resume

## ADMINISTRATION (Post-Hire Process)

### Description:

#### Initial Welcome:

- HR Paperwork
- Host Policies & Procedures
- Host Benefits
- Business Cards
- CIC New User Form
- Press Release
- Confidentiality / Conflict of Interest Form 250 or 250A
- Begain transition to SBDC Orientation

## SBDC ORIENTATION

### Description:

1. **Online PowerPoint Overview**
2. **Lead Center Orientation:**
3. **In-person meeting w/Staff; Welcome Kit**
4. **Field Orientation components:**
  - For Advisor:**
    - 1) Review w/director: services, funding, client referrals
    - 2) Register for CBA®; allot time to complete CBA®
    - 3) Assign mentor (optional)
    - 4) Review marketing materials, branding
    - 5) Read Operations Guide
    - 6) Develop /execute Individual Development Plan
    - 7) Attend Regional Meeting
    - 8) Attend monthly client workshops
    - 9) Introduction to community partners/Advisory Board
    - 10) Explain host and center relationship
    - 11) Review Key Performance Indicators (KPIs)
    - 12) Review Request for Proposal (RFP)
  - For Director (in addition to above):**
    - 1) Meet stakeholders, Advisor Board, staff
    - 2) Meet State Director, Fiscal Mgr., staff
    - 3) Review Director's Orientation Manual & Circulars
    - 4) Obtain Federal Fiscal Year's Due Dates
    - 5) Review invoice reports, CIC, past on-site reviews, success stories, operational agreements, internal financial accountability software with Host controls
    - 6) Review counseling notes and training events
    - 7) Meet local / Regional Directors for mentorship opps.
    - 8) Review funding as it relates to host and other partners
5. **Practicum (melding experience + education):**
  - 1) Analyze business plan; review w/supervisor
  - 2) Attend regional partners' trainings
  - 3) Shadow advisors, director counseling

Co-counsel dependent on skills
6. **Mentoring (both Director and Business Advisor)**

## CBA® (Certification Process)

### KNOWLEDGE FULFULLMENT

#### Description:

#### TRADITIONAL CBA COURSE

Marketing

Financial

HR

+

#### TOOLS & SKILLS TRAINING

- IQ®
- ProfitCents
- GrowthWheel
- Probative Counseling
- Presenttation Skills
- SBA: Access to Capital Webinar

Survey conducted after graduation.

## ONGOING PROFESSIONAL DEVELOPMENT (Emphasizes Learning)

### Description:

Thru IDP, select ongoing professional development to fulfill 2 purposes:

1. To provide **Gap Training**. Gap Training is determined by CBA® performance and if it shows:
  - a. Weakness in overall topic (Marketing, HR, Accounting/Finance);
  - b. Weakness in a particular segment of the topic;
  - b. Poor writing skills

Gap training must be related to area of weakness and completed one year after graduating CBA®.
2. To fulfil annual **CBA® Retention** requirement. Can include:
  - Professional certifications
  - Business-related Trainings
  - SBDC Signature Webinars
  - Conferences
  - Projects
  - Workshops
  - Completion of tool training
  - Publishing

(3) Survey SBDC trainings.

(4) Survey advisor trainings.

#### CBA COMMITTEE MEMBERS:

JAMES GRIGGY  
MARY ANN JASIONOWSKI  
STEVE SCHILLIG  
PATRICIA VEISZ  
CINDY VOORHIES  
CATHY WALSH  
BILLWERSSELL  
KIM WOODBURY  
ADJUNCT MEMBER: DOMINI HUNT