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Successful Orientation Programs

Career Development

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Linking People,
Learning & Performance

Successful Orientation Programs

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Orientation Process

The "joys" of job hunting are nothing compared with the "fun" of starting work at a firm. For many people, self-confidence and enthusiasm about a new job give way on the first day to anxiety and confusion. (What am I doing here? What do they expect of me? Whom can I go to for help?) How long this mental mayhem lasts—an hour or a few months—can depend a great deal on employee orientation.

Orientation is a process…not an event. It is part of the overall integration of new employees into the organization by which the organization helps the new hire adapt to the work environment and the job. Orientation is, in fact, a training opportunity to promote organizational effectiveness from the start of a person's employment. Successful orientation speeds up the adaptation process, helping new employees feel comfortable at the organization and making them more productive on the job. The process approach to orientation also results in reduced employee turnover.

There are a number of ways to conduct the orientation process, but all programs achieve the following outcomes:

1. The employee feels welcomed.

2. The employee understands the organization in a broad sense (its past, present, and its vision for the future) as well as specifics in key areas (its structure, culture, policies, and procedures).

3. The employee is clear about what is expected of him or her in terms of work and behavior.

The first day is all-important; new hires can acquire a greater understanding of the organization later through a formal, group orientation presentation. Newcomers should have their employment decision reinforced by being made to feel that the organization is happy to have them. They should receive the information they need to be immediately productive and meet the people who will provide continuing support during the orientation process: supervisors, a peer adviser or "buddy," and the human resources manager. A nice touch is to give them information about the surrounding community: community events, shopping, restaurants, places to go for a walk, and so forth. Another important welcoming gesture is to make sure that someone—the supervisor or buddy—takes the newcomer to lunch the first day.

While the organization provides a framework and the necessary tools, newcomers share in the responsibility for their own orientation process—through reading, self-study, training, observation, and taking advantage of coaching or mentoring opportunities. They can work out their own objectives for future development, and learn more about the organization by asking for informational interviews with co-workers. Since, ideally, all the other employees in an organization will contribute in one way or another to the orientation process—as supervisors, trainers, mentors, information suppliers, or just day-to-day contacts—employees at all levels should be involved in developing and implementing the process.

An unsuccessful orientation can mean more than slow adaptation for employees—it can mean *no* adaptation. No subsiding of first-day anxieties. No clearing up of confusion. Loss of interest in pursuing a career at the organization. Resignations by still-new employees. Poor work from those with so much potential.

Once you have organization-wide understanding of orientation's importance, you can begin a successful process. This issue of *Info-line* tells you how. You will learn the conditions necessary for good orientations, how to develop objectives, details of orientation development and implementation, and orientation evaluation. You also will find tips for training supervisors for their roles and conducting orientation tours.

Absolute "Musts"

The following conditions are integral to effective orientation programs:

1. All employees, existing and new, must understand the importance of orientation. Employees from entry level to senior level must be made aware of the tie between orientation practices and productivity, and they must take orientation seriously.

2. The organization must be willing to invest the amount of time, effort, and resources necessary to develop and maintain an effective orientation program.

3. The orientation program must be flexible enough to address the diverse needs of employees. The program developer must acknowledge differences in employee positions, work hours, experience levels, education levels, ages, and backgrounds.

4. To ensure ongoing effectiveness, one person or group within the organization must be ultimately responsible for the program. The orientation process must be owned by the entire organization, however. Integration of new employees into the workplace is a shared responsibility.

5. The person or group ultimately responsible for orientation must devote the necessary time and effort to training all others involved in implementing the program.

6. The orientation program must remain current. This means that those responsible must periodically assess organizational needs and how well the orientation program is meeting those needs. They also must conduct surveys of program participants for opinions about effectiveness and continually explore opportunities for program improvement.

Orientation Objectives

As with any training, well-thought-out objectives are essential for the orientation program. Follow these checkpoints when developing your program objectives:

☐ Assess the needs of the organization. How can the orientation program address them? (For additional information, see *Info-line* No. 8502, "Be a Better Needs Analyst.")

☐ Survey employees at all levels. What do employees from entry level to top management think the objectives of orientation should be? (For more details, see the face-to-face interviews and written questionnaires sections of *Info-line* No. 8612, "Surveys from Start to Finish.")

☐ Consider complaints voiced by current employees. What negative comments have been heard, and how can the orientation program promote more positive feelings from the start of employment?

☐ Consider comments made by employees in exit interviews. What problems with the organization have exiting employees expressed to the personnel manager, and how can the orientation program address these problems?

The complete list of orientation program objectives varies from firm to firm, but certain basics are found almost everywhere. Tailor the following basic list to your organization's needs:

● Reduce the common anxiety of new employees by making them feel a part of the organization.

● Promote in new employees positive attitudes toward their jobs and the organization.

● Establish from the start of employment open communication between the organization and its employees.

- Communicate to new employees exactly what the organization expects of them in terms of work performance and behavior.

- Acquaint new employees with the organizational strategy, goals, philosophy, values, products and services, structure, culture, systems, and people.

Retention

One casualty in a work environment that seemingly encourages downsizing and limited advancement openings may be company loyalty. As a result, organizations must pay extra attention to getting the right employees—and then keeping them. Employee loyalty needs to be cemented early on and nurtured on a continuing basis.

There are ways to address the problem of retention, such as networking and mentoring systems, flexible work arrangements, recognition, praise, and advancement opportunities. But the most important ingredient for successful retention, fostered by an ongoing orientation program, is **giving employees a sense of being valued and important.** For a case study illustrating how retention rates can rise dramatically as a result of a good orientation, see *Keeping Good Employees* at right.

Organizational Culture and Values

In concert with the retention problem is the need to foster a sense of "belonging" among new hires. Productivity suffers when employees are:

- overwhelmed or confused

- don't understand the link between their jobs and the organization as a whole

- feel frustrated by a seeming lack of opportunity

Keeping Good Employees

With good initiation, an organization can build employee loyalty from the beginning. In the 1980s, Corning, Inc., implemented an orientation program that resulted in a marked rise in employee retention rates. The New York-based company considers a smooth introduction so important that on the first day, their employees report directly to an orientation class instead of their place of work.

These classes, which are available each Monday to as few as two new hires, introduce the new employees to the Corning history, heritage, values, and the various positions within the company. During the second half of the day, the new hires sign up for benefits and receive their security badges. They also receive a new-employee workbook, covering each of the seven learning modules that they will go through, along with questions and summaries of each section.

Corning waits six weeks before finishing the remaining five modules of orientation, permitting new employees to become more familiar with the company. They then attend a two-day orientation session that covers topics such as the following:

- Corning's performance development and review process

- a module called Valuing the Individual that signals how much the organization values diversity

- how to read the annual report

- acceptable spending habits

- use of company resources, such as the Employee Assistance Program

- projects sponsored by the company's research and development and engineering groups

Corning's philosophy is that employees decide within the first six to eight weeks whether they are going to stay with a company. Since the first impression is a lasting one, the company tries to get the orientation done within that time frame in order to give its new employees a sense of being valued and important.

Adapted from "Attracting the Right Employees—and Keeping Them," by Gillian Flynn, Personnel Journal, *December 1994.*

Learning an Organization's Culture

When the human resources staff at Micron Technologies evaluated the company's orientation process, they discovered that new employees were not receiving the information they needed to become effective team members. In response, the training department developed a 15-hour training class designed to introduce employees to the organization. They enlisted the aid of employees from different areas of the company and sought feedback of managers and supervisors to design a course that reflected the company's philosophy and direction.

The course includes sessions that address the following topics:

Joining the company team: history and mission, stages of team development, and individual team behavior styles.

Participating in groups: expectations for participation in meetings, group dynamics, and specific techniques for becoming more effective contributors.

Gaining responsibility: taking charge of new assignments, asking questions and clarifying responsibilities.

Planning employee development: career development over the long term, analysis of job responsibilities, tasks, and standards, and the performance evaluation process.

Resolving workplace issues: conflict resolution and the company's problem-solving procedure.

Dealing with change: effects of unwelcome change and how to respond effectively to such changes.

Each segment incorporates in-class activities and on-the-job assignments and is co-facilitated by a supervisor or manager from various departments in the organization. The course concludes with an assessment of how each team moved through the stages of group development, their profit-and-loss statements, and how the differences in their behavior were reflected in the team's dynamics. Through this course, the company hopes to effect greater employee motivation, initiative, and job satisfaction by providing an understanding of the organization's values and how each employee's efforts support those values.

Adapted from "From New Recruit to Team Member," by Karen Bridges, et al., Training & Development, *August 1993.*

Frequently, new hires are immersed in the organizational culture without an adequate understanding of it. A successful orientation process will communicate this culture in an interesting and useful way in order to help employees understand the company's values and how their department's goals support those values. For an example of an innovative program developed to achieve these goals, see *Learning an Organization's Culture* at left.

Orientation and Productivity

A focus on what it takes for a new employee to be effective immediately can be an important element in the orientation process. One approach is to develop training classes involving highly interactive and experiential learning techniques that engage participants in applying their skills immediately. Program designers can determine which pieces of information new employees can use right away and which can be offered in other formats at other times.

Information about company history and culture is woven into the activities of these workshops, which can include:

- team and meeting skills
- problem solving and decision making
- quality control tools
- diversity appreciation
- change management

When carefully designed and implemented, the use of these training techniques in the orientation process can meet all the "traditional" objectives while fostering a more rapid assimilation and consequent increase in productivity for new employees.

Development and Implementation

Once you have determined the orientation objectives, it is time to develop the program. To do so, you will need assistance—information and opinions—from a variety of people. You will call on different people for more than program development help, however; you will also rely on others to help implement the program. Supervisors and co-workers of the new employees, and perhaps even the firm's president, play roles in conducting orientations.

Following are recommendations for an umbrella program, encompassing core content as well as departmental or individual content. These recommendations include general guidelines and what topics to cover—how to cover them, who should cover them, where, and when. Remember to build in flexibility; revise your umbrella program as needed to address diverse employee groups or to address the changing needs of your organization.

Guidelines for Groups and Individuals

Here are helpful guidelines on developing an orientation process. If you have a number of new employees, regularly scheduled group orientation sessions are the most efficient way to disseminate information about the organization, but keep in mind that job-specific orientation information should be presented one-on-one on the first day of employment.

Groups

Send new employees written orientation materials the first day on the job. This gives them a chance to skim information and prepare questions for the orientation sessions. In addition, the employee can refer to the materials for any information he or she wants immediately that may not be presented for a while. Along with the orientation materials also send a schedule of any job training sessions, such as computer training, that will occur during the orientation period.

Plan orientation sessions for no longer than 90 minutes. If you have a lot of information to cover on one orientation topic, break it into 90-minute presentation segments and plan sessions on successive days. Sticking to this time limit prevents information overload. New employees can easily become overwhelmed by fact after fact on the firm's background, beliefs, benefits, or other orientation topics.

You may not need to develop two-part or three-part orientation sessions. But if you do, here is a benefit: Participants have a good opportunity (an entire day, at least) between sessions to consider questions they may have. Some people have difficulty pinpointing their area of confusion on the spot during a postpresentation question-and-answer period. The total amount of time necessary for orientation sessions depends on the size and complexity of the organization, the complexity of the jobs new employees assume, and the number of orientation objectives to be fulfilled.

Individuals

Focus on orienting each new employee, not just a group. Keep individual needs in mind. Make the supervisor key to the program (see *Supervisor Training Tips* on the next page). Supervisors are responsible for their personnel, and that responsibility begins on each employee's first day. Give supervisors an active part to play in orientation, and train them well. The long-term success of a new employee can depend a great deal on how involved the supervisor is in orientation and how well he or she carries out orientation responsibilities.

Ask supervisors to assign each new employee a "buddy" for the initial orientation period—a peer-level co-worker. The buddy provides day-to-day support: to help the new employee feel at home, to answer questions, and to orient the employee to informal rules and social norms at the organization. The co-worker chosen must have excellent work behaviors, a positive attitude toward the organization, and enough experience to correctly answer the new employee's questions. The supervisor or buddy should take the new employee on a tour of the facilities during the first week of employment (see *Facility Tours* for guidelines).

Strange as it sounds, even a top manager should have a buddy, although the assigning of one may be much more informal. This buddy could be the new employee's mentor if a mentoring system is in place.

Supervisor Training Tips

Make sure supervisors are well prepared for their orientation roles. Following are guidelines for a supervisor training session:

● Explain the orientation objectives and the rationale behind the program.

● Emphasize the importance of orientation and how it affects performance and retention of employees and organizational productivity.

● Explain the entire program, highlighting supervisors' roles.

● Let supervisors rehearse their roles. Ask them to pair off and take turns playing supervisor and new employee. Coach supervisors in their performance. (For assistance in conducting this part of the training, see *Info-line* No. 8412, "Simulation and Role Play.")

● Set up small-group discussions. Ask supervisors to talk about employee problems that might be prevented by the orientation program. Ask them to think back to their own orientations, or lack thereof, and consider the benefits of your orientation program.

Relocated Employees

Assist new employees from out of town, who have a harder time feeling "at home," by preparing packages of information about local services and events. Include such things as public transportation brochures and listings of restaurants, shopping centers, parks, libraries, churches, synagogues, and hospitals. Send these packages ahead of employment time if possible.

If your organization believes this much help is beyond the call of duty, at least make a few information suggestions to the new employees during orientation sessions. You may even consider suggesting to management that your organization host one or two social events each year for employees and their families. Experts believe such events are excellent ways to help new employees assimilate at the organization and keep them employed longer.

Temporary Employees

As a cost-cutting measure, many of today's streamlined organizations make frequent use of temporary employees. When you have "casual hires" coming and going, you need an orientation program that ensures proper training and creates instant rapport with full-time employees.

Begin your orientation with a welcome and general information about the organization. Explain company policies, such as dress guidelines and attendance, and basic work information, such as hours of operation, breaks, lunches, and general ethical work expectations. Try to give the temporary employee a quick tour of the work area, and pair them up with a supervisor or co-worker who can address any concerns they may have.

Focus your orientation for temporary employees on the following essentials:

● What do they need to know?

● Do they have the necessary skills to do the job?

● What would it take for them to be more effective immediately? Can you provide job aids that will assist them?

- Are there any differences in language or culture that need to be addressed?

- Is there someone nearby who can answer their questions and make them feel welcome?

If your organization is hiring a number of temporary employees at the same time, consider beginning a general orientation session with an icebreaker to give them an opportunity to get to know one another. (For examples, see *Info-line* No. 8911, "Icebreakers.") Fostering an atmosphere of teamwork is just as important for temporary employees as it is for permanent workers. If they feel that they belong and enjoy the work environment, they will stay longer and be more productive.

What to Cover

Following are topics that must be covered in any orientation program. Based on the needs of your organization and employees, determine a timeline for distributing the orientation content. You cannot cover all the information in one day, but you should not wait too long to cover the important topics. Decide what your new hires need to know the first day, the first week, the first three months—then decide what should be reinforced as a part of your ongoing orientation efforts.

■ *Organization Overview*
Cover the history, philosophies, goals, and managerial style of the organization.

■ *Nature of the Business*
This part of the orientation covers the type of business; profile of customers or clients; facilities; functions of various divisions; products and services offered; overview of how products work and how services are provided; competitive products and services; financial background of the firm.

■ *Structure*
Distribute an organization chart showing all divisions and reporting relationships. Give the new employee a chart or handout showing the structure of his or her department. Provide the names and positions of personnel who are key to the new employee's job, including names of all top management team members.

Facility Tours

Often the new employee's supervisor or buddy conducts facility tours, but the orientation program manager should handle the tour planning. Following are tips for planning effective facility tours:

■ *Employee Needs*
Keep the needs of individual new employees in mind. Specify the route and include stops at all work areas relating to each employee's job. Leave out work areas unnecessary to the orientation of the particular employee or group of employees going on the tour. Include in your plan a list of staff members the new employees should meet on the tour.

Point out fire extinguishers, fire escapes, and exit stairways and discuss evacuation procedures. Check the restrictions imposed for visitors at work areas you want to include in the tour, ensuring in advance that visitors are allowed access.

■ *Time Requirements*
Include approximations of time to be spent in each work area and with staff members to be met. Some employees, due to the nature of their jobs, need more exposure to certain parts of the organization than other employees. Specify which staff members introduced on the tour are to give brief overviews or demonstrations of their work. Notify these staff members in advance of the tour date and time, offering any assistance they might require. Consider the noise level at the areas where these staff members work—if it is too high, find another location for their presentations.

Consider how much time all the stops will take. Tour participants can tire easily and lose attention, so make sure the tour will not run too long. If the tour is necessarily long, however, build in rest and refreshment breaks.

■ *Number of Participants*
Do not schedule too many new employees for one tour. Set the limit at three or four so you can plan the tour to meet their particular needs—too many participants with too many different needs means too long a tour. In addition, if too many people are taken on one tour, the tour guide and staff members speaking along the way will have to shout.

■ *Performance Expectations*

Include what the organization expects of employees in terms of work performance: expected levels of productivity, expected work habits and ethics, and so forth. Also present what employees can expect from the organization in terms of equitable treatment, professional development opportunities, and financial rewards.

■ *Behavior Expectations*

Distribute and discuss a list of organizational norms—rules of expected behavior for the organization and employees. Typical norms incorporate culture, philosophies, and values of the organization. A sample norm for the organization might be: "The equality, dignity, worth, and potential of individuals will be recognized." Sample norms for employees might be: "We will conduct ourselves professionally: responsibly, ethically, and legally." "We will resolve conflicts at the lowest possible levels and with willingness to negotiate." "We will support group decisions."

■ *Policies*

Distribute a brochure or manual prepared by human resources that covers organizational policies, procedures, compensation practices, and benefits. Provide details on the following areas of interest:

● how and when performance appraisals are conducted

● how often salary is increased, how increases are determined, and how they are computed

● benefits offered: health and life insurance, retirement plans, profit sharing, vacation and personal days, holidays, employee services

● policies and procedures: work hours, overtime, comp days, inclement weather days, sick leave, funeral leave, military leave, jury duty, maternity/paternity leave, leaves of absence, probation, discipline, and security

■ *Safety Rules and Health Requirements*

If the industry you are in requires extensive coverage of safety rules and health requirements, provide a manual and a special safety and health audiovisual presentation. If only a few rules and requirements need explanation, they can be included in the policies and procedures brochure.

■ *Office Procedures and Supplies*

Explain procedures for such things as sending interoffice correspondence, ordering supplies, requesting checks, and filling out expense reports. Show the new employee how the telephone system works, how to use the copy machine, where supplies are kept, and so forth.

■ *Individual Job Specifics*

On the first day of employment, the supervisor should discuss the content of the individual employee's job in a private office. The discussion should cover the job description, work objectives, and performance expectations as well as a review of the performance appraisal process. This is the time to clarify any confusion over functions and responsibilities and to tell the employee how his or her job fits in with and affects others in the organization. The supervisor should emphasize the importance of this particular job, describing how it contributes to organizational success.

Orientation Follow-Up

As a part of the ongoing orientation process, supervisors should conduct private follow-up meetings with new employees. During these sessions, the supervisor should do the following things, and then share the result with the orientation program director:

1. Answer any questions the employee still has about items covered in the orientation.

2. Encourage the employee to share any problems encountered with the organization thus far and to express any concerns. Address those concerns.

3. Gauge the employee's comfort level at this point with the organization and his or her job.

4. Determine the need for additional training, remembering that orientation is a process, not an event.

Preemployment Orientation

A number of organizations use the period between an employee's hire date and start date to begin the orientation process early. They send some or all of the written orientation materials to the new employee, all at once or distributed over time. This usually depends on how much orientation material there is and how long a period there is between hire and start dates. The materials sent include those ordinarily distributed on the employee's first day:

● a handout or brochure on the organization's history, philosophies, goals, and managerial style

● product and service brochures; information on customers, clients, and competitors; the organization's annual report

● organizational and departmental charts

● the policy and procedure brochure or manual

● the list of organizational norms

● a tentative schedule of orientation sessions once the employee begins work

Depending on the length of time before the employee starts work—it may be months if the new hire is still finishing school or is relocating—the materials sent can also include the following:

Correspondence from employee's supervisor: weekly or monthly notes to stay in touch and to keep the employee on top of what is happening in the department.

Internal publications and memos: information about current organizational activities (the employee is put on a weekly or monthly mailing list, or is contacted by email).

Preliminary job training materials: schedules of sessions the employee will attend, job information sheets, self-study manuals and workbooks.

Advantages

An early start on orientation is advantageous for both employer and employee. Here is why:

Employer

● Strengthened employee commitment to the organization. A long period between hire and start dates gives new hires a lot of time to change their minds. By regularly sending them organizational materials, the employer keeps their interest and helps ensure they will not seek out better offers.

● Anticipation of working with a self-confident employee.

● Expectation for early productivity of a new hire who feels comfortable at the organization.

● Simpler training; high levels of productivity begin sooner.

Employee

● Reassurance that the organization is holding his or her job—especially important if the hire-to-start period is a long one.

● Assurance that the supervisor is happy to have him or her on board. Preemployment correspondence exudes interest.

● Reduced anxiety about fitting in at the firm prior to the first day of work. Through preemployment materials, the new hire gets a feel for the organizational culture and gets familiar with staff members in advance.

● A jump start on learning job functions, which makes the formal training easier to complete successfully.

Online Orientation Programming

Many organizations are now delivering their basic orientation information via CD-ROM or the intranet. The idea is not to replace but to supplement traditional face-to-face methods of delivery. The advantages of online delivery are many:

Eliminates information overload. New hires can access the orientation data when and where they want to—and as often as they like.

Reduces or eliminates the cost of transporting new hires into a central location for orientation.

Provides a useful method of delivery for overseas employees, or during preemployment orientations.

Produces a consistent orientation message for all new employees. Permits easy updating of organizational policies and operations.

Reduces the number of follow-up questions for supervisors. New hires can go back to the online resource for a refresher.

There are disadvantages to a total reliance on this type of orientation, not the least of which is the ready availability of computer access for all new hires. Furthermore, it constitutes an impersonal introduction to the new work environment, which makes it difficult for a new employee to feel welcome. A number of organizations are finding that their new hires like technical delivery, however, as long as the program is easy to use and the quality of the content is good.

Evaluating Orientation Programs

To evaluate the effectiveness of employee orientation programs, get feedback from the new employees and the supervisors who participated. Measuring participant reaction is, according to Donald Kirkpatrick's four-level approach to evaluation, a Level 1 evaluation. This type of evaluation is important because it determines customer satisfaction.

The participant must see some value in the program and usefulness of the knowledge acquired. Managers want the investment in training and development to produce a measurable impact on business performance standards. Reaction evaluation will help determine if you have achieved the outcomes you wanted. (For details, see *Info-line*s No. 9813, "Level 1 Evaluation: Reaction and Planned Action," and No. 8612, "Surveys from Start to Finish.")

Employee Reactions

Send oriented employees a questionnaire, asking the following questions:

1. Did the orientation program in general prepare you well for your job?

2. Which program topics were most important to your job:

   - organizational history, culture, philosophies, goals, and managerial style

   - nature of the business; facilities; products and services; profile of customers or clients and competitors; financial background

   - organizational and departmental structure and introduction to staff members

   - general performance expectations

   - behavior expectations

   - organizational policies, procedures, compensation practices, and benefits

   - safety rules and health requirements

- office procedures, equipment, and supplies

- specific job requirements and expectations

3. Do you think enough orientation time was devoted to the most important topics? Do you think too much time was spent on any topics?

4. How effective was the training in each of the program topics? Was the training on target with your needs? Was it thorough? Was it interesting? Were the people conducting the training well prepared? Did they communicate well?

5. Did the sequence, timing, and duration of orientation sessions fit your schedule and information needs?

6. Do you have any suggestions for improving the orientation program?

Supervisor Reactions

Interview supervisors for their thoughts on orientation effectiveness. Ask these questions:

1. How well are oriented employees performing on the job? Do you think orientation is helping, hindering, or having no effect on performance?

2. Do just-oriented employees seem comfortable with the organization? Do they fit in well with your department? Do they display positive attitudes? Do you relate any of these outcomes to their orientation?

3. Are you comfortable with your role in the orientation program? Should your participation be different in any way?

4. Do you have any suggestions for the orientation program in terms of the following:

   - topics covered

   - activities and materials used to cover topics

   - person responsible for covering each topic

- time devoted to each topic

- scheduling of sessions

Successful Outcomes

Do not simply collect employee and supervisor feedback—use it! Revise your program as needed to address employee and supervisor concerns and to stay current with organizational changes. The result will be continuous successful orientation outcomes. You will know if your orientation program has been successful if you can say that the new employee:

- feels at ease and welcome at the organization

- has a good grasp on organizational history, values, and goals

- understands the industry the organization is in and the functions of different divisions and departments

- understands what the organization expects in terms of work and behavior

- knows the importance of his or her job and how it fits in with the work of others

- knows everything necessary to start performing his or her job

- knows where and who to go to for help with work matters

- knows the policies and procedures of the organization

- is happy to be a part of the organization

- has a positive first impression

These outcomes can become part of a post-orientation follow-up evaluation to answer the question: "How did we do?" Be open to any changes that are suggested, and continually strive for a more effective process.

Final Words on Good Starts

New employees are interested in the total organization. They *want* information on organizational history; they *want* introductions to different departments and personnel. They *want* a feel for the corporate culture and structure; they *want* to know where they fit in. They want to know what the organization expects of them, and they want to know what to expect of the organization. And they want all of this early on so they can feel comfortable on the job as soon as possible.

Good impressions at the start are essential. When new employees are welcomed, made to feel wanted and valued, given complete information, trained, coached, and supported, their feelings about the organization are enhanced. If, however, they are ignored, their feelings about the organization suffer and it is likely they will never fully recover from that experience.

As the old saying has it, "You never get a second chance to make a first impression." Poor early impressions of the organization stick with employees and send them looking for work elsewhere. Orientation is not, however, a one-time event but an ongoing process—employees who experience a continued learning and growth environment within the organization are likely to remain happy and productive in their jobs.

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Orientation Checklist

This checklist is a guide for everyone involved in the orientation process. The new employee carries it throughout the orientation process and the person who covers each topic fills in the appropriate boxes, then initials and dates the document. Upon completion of the orientation process, copies of the checklists are then reviewed and retained by human resources personnel.

New Employee: _____

Start Date: _____

Position: _____

Department: _____

Supervisor: _____

Buddy: _____

Program Administrator: _____

Topics	Informal Discussion	Formal Presentation	Training	Materials Distributed (check if applicable)	Initials	Date
Part 1: Organizational Background						
☐ Distribute handout or brochure.						
☐ Review and discuss informally:						
organizational history						
organizational philosophies						
organizational goals						
managerial style						
☐ Review and discuss in session:						
organizational history						
organizational philosophies						
organizational goals						
managerial style						
Part 2: Nature of Business or Facilities						
☐ Distribute handout or brochure.						
☐ Review and discuss informally:						
nature of the business						
profile of customers/clients						
facilities						
functions of various divisions						
products and services (offered)/how they work						

Topics	Informal Discussion	Formal Presentation	Training	Materials Distributed (check if applicable)	Initials	Date
Part 2: Nature of Business or Facilities *(continued)*						
competitive products and services						
financial background of the organization						
☐ Conduct tour of facilities, introduce new employee to personnel.						
☐ Review and discuss in session:						
nature of the business						
profile of customers/clients						
facilities						
functions of various divisions						
products and services (offered)/how they work						
competitive products and services						
financial background of the organization						
Part 3: Organizational Structure						
☐ Distribute organizational and departmental charts.						
☐ Review organizational and departmental structures and reporting relationships.						
☐ Introduce new employee to department staff.						
Part 4: General Performance Expectations						
☐ Review and discuss in session:						
expected levels of productivity						
expected work habits and ethics						
equitable treatment						
professional development opportunities						
career advancement opportunities						
financial rewards						
Part 5: Behavior Expectations						
☐ Distribute, review, and discuss organizational norms.						
Part 6: Policies						
☐ Distribute brochure or manual.						
☐ Review:						
performance appraisal procedures						
compensation practices						

Job Aid

Topics	Informal Discussion	Formal Presentation	Training	Materials Distributed (check if applicable)	Initials	Date
Part 6: Policies *(continued)*						
insurance benefits (health and life)						
retirement plan						
vacation/holidays						
work hours/overtime						
inclement weather days						
sick, funeral, military leave						
jury duty						
security						
Part 7: Safety and Health Requirements						
☐ Distribute manual.						
☐ Deliver demonstration (if required).						
Part 8: Office Procedures, Equipment, and Supplies						
☐ Explain procedures for:						
interoffice correspondence						
ordering supplies						
requesting checks						
expense reports						
☐ Demonstrate/show:						
operation of telephone system						
operation of copy machine						
where supplies are kept						
Part 9: Specific Job Requirements						
☐ Review:						
job functions						
job responsibilities						
work objectives						
job performance expectations						
how job fits into the organization						
Part 10: Orientation Follow-Up						
☐ Answer questions, discuss orientation experience, assess additional training needs.						

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