



Employee Orientation, On-boarding and Training

Learning Outcomes

By the end of this unit the learner will be able to:

- ✓ Discuss current issues in the human resource field and the changing role of supervisors and managers in terms of HR functions.
- ✓ Write job specifications and identify core competencies.
- ✓ Apply methods of finding, selecting, and keeping the best people using behavioral description interviewing techniques.

Employee Orientation, On-boarding and Training

Why Have Orientation?

Companies spend a lot of time and money recruiting and hiring new employees. Once the hiring decision has been made, many managers feel their job is done. Once the new employee arrives for work, there is very little formal attention paid to reinforce the notion that the employee made the right decision and that they have come to a well-organized, well-run company.

The orientation program actually begins during the interview process, as interviewers give the employee some sense of what the organization is like. The orientation continues either planned or unplanned when the employee arrives at work. The employee is making up their mind about what type of company this is and whether they will want to continue working here.

Most employees arrive for work that first day full of enthusiasm and determined to do a good job. Sure, they are a little bit nervous, but they are confident everything will work out. A poorly-planned or non-existent orientation program will cost the organization more money in the long run and perhaps make the new employee another turnover statistic. You also need to remember the importance of providing an orientation for part-time employees. Over the long term your organization loses if they don't feel you recognize them as a part of the team.

Orientation

This is the initial exposure to the company that takes place in the first couple of weeks on the new job. It is how you share your policies and procedures, introduce the new person, and help them get up and running in the new environment. It can include on the job training, short safety courses, as well as any certifications that need to be secured as the employee starts their new job. (Things like defensive driving, first aid, and company specific tools and software could be included here.)

Onboarding

Onboarding starts during orientation, and can go on for as long as 18-24 months. This is the training and engagement process that helps to link the person to the organization, and where there is an exchange of their value and growth being productive for the company. Onboarding can include a plan for professional development, training, and succession within the new company.

How Did Your Orientation Rate?

Questionnaire

Think back to your first day on the job with your current company. Read each statement and check True or False as it relates to the orientation you received.

Statement	True	False
I was made to feel welcome.		
I was introduced to other members of my workgroup.		
My boss paid attention to me and made me feel welcome.		
My orientation seemed well planned.		
Company benefits were well explained on the first day.		
My office or workspace was set up and waiting for me.		
I received a tour of the organization by a qualified person.		
All the necessary paperwork and forms were available and I received assistance to complete them properly.		
I received a copy of relevant information such as the Employee Handbook, Operations Manual, etc.		
I learned about the company's history and future plans.		
My supervisor reviewed my job description with me and outlined his/her expectations of me.		
I was invited to lunch that first day with my boss or some other key person.		
I met people from other departments.		
I was able to observe colleagues at work before starting a task.		
I was given a specific job assignment, along with instruction or training.		
Office hours, dress code, sick leave, and other policies were explained to me.		
I was shown the necessary systems (telephone, computer, etc.).		
I had opportunities to ask questions.		
Payroll policies (and withholdings) were explained to me the first day.		
At the end of the week I felt like a member of the team.		

Scoring

How did your orientation rate?

- **18-20 True:** Your orientation was outstanding.
- **15-17 True:** Your orientation was above average.
- **11-14 True:** Your orientation was average orientation.
- **10 or Less True:** You have an opportunity to help your organization improve its orientation process.

Test your Knowledge

Think back to your first day on the job. Now, consider how you can use those memories to make improvements to the orientation programs at your company.

Problems to Avoid

There are some common mistakes many managers make when it comes to orientation and onboarding:

- Telling too much at one time
- A failure to use demonstrations and involvement; they just talk at new employees
- Lack of patience
- Lack of preparation
- Not allowing for feedback
- Failure to reduce tension

How can you avoid these problems?

How have you avoided them?

Planning the Orientation Program

How will you plan to make the new employee feel welcome?

How can you make certain the employee has clear direction about job expectations?

What might you put in a "New Employee" kit?

How can you lay the foundation for any training the new employee might need?

What follow-up, if any, should you do after the employee has gone through the orientation program?

What is the manager's role in the orientation process?

Follow the Leader

As a supervisor or manager at your company, you help to set the standard for professionalism within the organization. Your staff looks to you for leadership, credibility, and reliability, among many other things. This exercise will look at some leaders throughout time and look at those we want to follow.

Look at the images around the room. Then, match a leader on the wall to each question below.

Which leader would you most like to have as a staff member?

Which leader would you least like to have as a staff member?

Which leader would be most effective at providing human resources services?

Which leader would be the best at inspiring change in your organization?

Which leader would be the best at motivating your employees?

Which leader would be the best teacher in your organization?

Which leader would you like to have as your supervisor?

Which leader are you most like?

Which leader would you want to be like?

If you could choose any of these leaders to join your organization today, who would you choose?

Planning Training

The Training Cycle

The Five Steps

At some point we will all need to arrange training for our employees. There could be new equipment, changes to our environment, the need for growth in soft skills, or an ability to manage our own selves better.

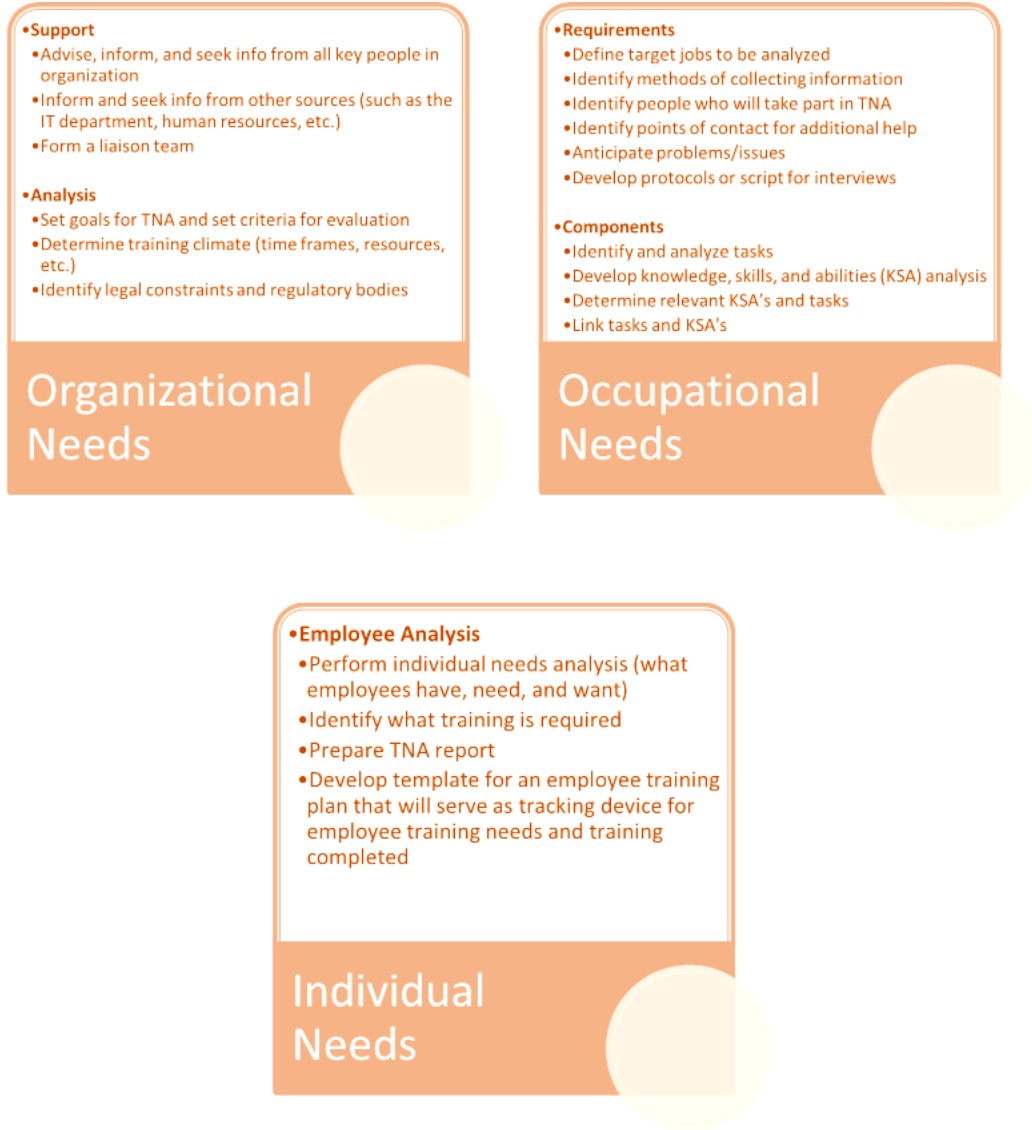
The training process consists of five steps:

1. What is it the organization needs?
2. What are the priorities?
3. Design the training strategy.
4. Deliver the training.
5. Measure the effect of the training.

Advantages of a Training Needs Assessment (TNA)

In order to determine what the organization needs, you may want to conduct a training needs assessment. A training needs assessment will help you identify what the employees need. They also let employees have their say in the type of training they are to receive.

Training Needs Assessment (TNA) Process



Getting Your Plan Approved

Once you have determined the need for training, you can work with senior management to approve training once you are able to demonstrate the value to the organization (a return on their investment on the training that is recommended), and still give employees the feeling they have had input. Employees are only likely to benefit from training that they can also see a benefit to.

Internal vs. External Training

Identify some possible advantages and disadvantages of internal and external training.

Internal Training	External Training

Working With External Providers

So you have decided to bring in an external consultant to do training. What criteria should you use?

- Decide what you want ahead of time.
- Depending on the size of your training investment, obtain quotes from multiple providers (three normally) or consider issuing a request for proposals.
- Invite more than one provider to present to you.
- Check references, either from within your own organization or elsewhere.
- Ensure you meet with people you will be working with, not just sales people in the training organization.
- If possible, go observe the trainer while they are training.
- Select the best option for your money.

A Performance Management Checklist

Introduction

The following checklists were prepared as a quick reference tool for the performance management process. Keep these checklists as a reminder to yourself on the details of the process.

Please keep the three fundamentals in mind at all times:

- Do your employees understand *what you expect* of them?
- Do your employees know *how well* they are performing?
- Do your employees *have what they need* to improve their performance?

Review the checklist through each phase of the process. As you plan, use the Objectives and Results checklist. As you meet with employees, use the Support Plan checklist. Throughout the year (as you talk to and coach your employees), refer to the Meeting with Employees and Ongoing Support and Feedback checklists. And finally, as you prepare for the review phase, use the Performance Interview and Performance Review checklists to make sure you are properly completing the performance management process for the period.

Objectives and Results Checklist

- Are your organization's objectives/goals reflected in the objectives and results expected of the employee?
- Is it clear what is expected of the employee? Are objectives specific, accurate and results oriented?
- Is it clear how performance will be judged through the results?
- Are these expectations realistic? Achievable? Timely?
- Have you planned for no surprises by the end of the process?

Support Plan Checklist

- Are there any obstacles to the employee meeting your expectations of objectives and results?
- Can these obstacles be overcome with specific training, better equipment, increased feedback from the supervisor, or other means?
- Is there any other obstacle in the way of achieving the goals?
- If so, can it be overcome by re-prioritizing or re-assigning some tasks without sacrificing performance in other areas?
- Does the support plan accommodate all the requirements needed for the employee to meet the objectives you have set?

Meeting with Your Employees Checklist

- Will the employee understand how performance will be judged?
- Has the employee raised any objections to the proposed objectives and corresponding results expected?
- If so, have these been resolved?
- Have you explained what performance management means to your employee?
- Have you outlined the three phases of the process?
- Does the employee understand the benefits of the process?
- Does the employee understand the importance of his or her job to the goals of the team?
- Does the employee understand your expectations in terms of both objectives and results expected?
- Does the employee feel she/he has all the resources required to achieve these results? Is the Support Plan complete?
- Do your employees understand that they can return to you at any time to discuss your performance expectations, particularly if they are encountering problems?
- Have you answered all the employee's questions?
- Have you heard your employees and taken their concerns and comments to heart?

Ongoing Support and Feedback Checklist

- If you were to perform a review today, on any of your employees, would there be any surprises for them?
- Have you set a goal for yourself to informally but regularly touch base with each of your employees to ask how things are going, ask whether there are any problems, and discuss any difficulties in the achievement of their performance?
- Do you correct performance problems immediately?
- Do you congratulate successes immediately? (Remember that success is relative. Getting a supply requisition in on time can be a major success for a chronic procrastinator!)
- Have you reviewed the employee's work plans and objectives at least once during the period?
- Have you updated or modified those work plans and objectives that require revision? Have you done so with the employee's input and agreement?

Performance Interview Checklist

- Did you give the employee a copy of their self-assessment package one week before the meeting?
- Have you set an appointment at a convenient time for the employee? Have you allowed sufficient time for your interview? Have you made sure there will be no interruptions?

- Did you brief the employee before the interview so the employee knows to come prepared to discuss past performance and future performance?
- Has the employee been able to complete those sections for which he or she is responsible?

Performance Review Checklist

- Will there be any surprises for the employee?
- Have you provided factual information where appropriate on the form?
- Are your comments specific and accurate, making reference to original goals established under objectives and results?
- Can you support the judgments you make and record on the form with specific examples of the employee's performance during the period?
- In cases where the employee's performance met the objectives set, have you acknowledged the employee for a job well done?
- Have you both signed the report?

Case Study: Who Will Be the Best?

Case Study: Who Will be the Best at Performance Reviews?

Janice and Fletcher are new supervisors attending their first training workshop. They have not covered material on performance reviews yet but are discussing their personal philosophies about them over lunch. Janice doesn't believe that a fair performance review can be made of an employee's work unless assignments have been discussed and expectations agreed upon in advance. She thinks that work should be assigned in measurable terms so both she and the employee can track performance as the work progresses.

Fletcher thinks this approach is dangerous. He feels employees should be given only a general idea of what is to be accomplished. He thinks employees who participate in establishing performance objectives will set them too low. He prefers to leave performance expectations vague to see what the employees accomplish on their own. If their standards don't measure up, he will let them know then and there.

Discussion Questions

Who do you think will be the best at performance reviews?

Why?

Dissecting a Performance Review

Now that we know a little bit about performance reviews, let's take a look at the actual components.

Key Results Areas

These are the areas we feel are most important. The principle observable events with which we should deal in a performance appraisal are those relating to the key results areas as determined in the job description. If job descriptions have been properly and thoughtfully written, the key results areas should reflect the reality of employee performance. These are the key results the employee is expected to achieve, and these should be observable results. It is amazing how little attention is paid to key results areas, even though we have said in the job description that these are the results we want from the employee.

Observing performance in key results areas is most likely to give us objective evaluations of employee performance. If we can't rely on observable behaviors, we have to resort to subjective evaluations, and when that happens, our own biases and prejudices can get in the way of fair appraisals.

Let's take just one example: cooperation. Let's say you were asked to rate it on this scale: excellent, above average, average, fair, or unsatisfactory. What would you check? Is that the same as how I would rate an employee? Maybe, maybe not.

Rating the Raters

Managers want to be fair in their ratings, but in one large organization, they had high raters and low raters. Some people gave all "excellents" while others gave a lot of "fairs." Their solution to the problem was to hire some additional people to rate the raters. Of course, one may wonder, "Who rated the raters?"

Then there is the company where managers gave 98% of their workforce an “above average.” How can 98% of a company perform better than the average?

Evaluating Behaviors

What if, in the instance of cooperation, we list the observable behaviors normally done by the people labeled “cooperative” and ask whether or not the person does these things:

- Offers to help others
- Offers to work late
- Makes suggestions for improvement
- Follows through on commitment

Let’s look at another example: initiative. Criteria might include:

- Undertakes projects without being asked
- Writes letter without supervisor reviewing them
- Calls meetings on their own
- Orders materials on their own

Here is another situation. Let’s say you’ve hired a truck driver. After a couple of weeks, you ask the driver’s supervisor how the truck driver is doing and the supervisor replies, “Just fine. She is very personable and trying hard. She wants to do a good job.”

Did the supervisor just give an observable or subjective evaluation?

We might ask, are we paying the truck driver to be personable, trying hard, and interested in doing a good job, or is she being paid to:

- Submit her route plan daily
- Deliver 10 loads per day
- Hand in her report at the end of the day

Sometimes we hear employees saying they shouldn’t be evaluated on their performance; they are being paid to think and plan. For example, is it fair to evaluate a policy writer on how many policies they produce? Probably not. But if a policy writer never had any of their policies accepted and implemented, we’re not sure that person should be on the payroll.

There must be a way to evaluate employees on the basis of what they accomplish.

Identifying Behaviors

Think one of the positions that you will be evaluating. Then, develop at least four observable behaviors to consider when that person comes in for a performance review.

Behavior	Criteria

Further Reading:

- ✓ *Barbazette, Jean. Successful New Employee Orientation (3rd Edition). Pfeiffer, 2006.*
- ✓ *Brockbank, Wayne, David Ulrich, Michael Ulrich, and Jon Younger. HR from the Outside In: Six Competencies for the Future of Human Resources. McGraw-Hill, 2012.*
- ✓ *Collins, Jim. Good to Great. Harper Business, 2001.*
- ✓ *Great By Choice. Collins Business, 2011.*