

How to Conduct an Orientation for your New Manager



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Introduction

This booklet is designed to help you conduct a successful orientation for new managers. Feel free to adapt it to your needs, but keep in mind the basic principles as you do so.

This booklet is designed to give you information on:

- What an orientation is
- Why it is important to put together a structured orientation
- How to encourage your current staff to participate in the process
- How to pick who should be involved in the orientation
- How to plan out the orientation process
 - Prior to day 1
 - Day 1
 - Week 1
 - Ongoing follow-up

How to use this book

This book is meant to be used as a resource.

Once you feel comfortable with the information presented here, you can go to the appendices and just use the checklists for every orientation you conduct.

About Light the Lamp

We provide tailor-made HR solutions for companies just like yours. Located in Vancouver, British Columbia, we specialize in providing small to medium sized businesses with valuable, relevant HR solutions that are custom-made to fit you. We work as a team to meet your needs and ultimately achieve your goals, together.

*No corporate jargon, no red tape.
We assist. You score. It's that simple.*

If you have a challenge you think we can help with, please don't hesitate to contact us.

A. What is an orientation?

“Orientation is the formal process of familiarizing new employees with the organization, their job, and their work unit. Its purpose is to enable new employees to get ‘in sync’ so that they become productive members of the organization” (Belcourt, p.212).

Certainly a structured orientation session for your new manager is important, but a proper orientation is not over after the first day. Orientation is the first step in the training process. Follow-up should continue at least until your manager has reached his/her 3-month introductory period.

B. Why bother with a structured orientation?

Many companies spend a great deal of time and money on the recruitment and selection process and nothing when it comes to doing the actual orientation. If you brought someone to a party where they didn’t know anyone, you would never think of taking off and leaving them to fend for themselves without so much as an introduction, yet this is exactly what happens when you don’t plan an orientation for your new manager. They’re left to fumble through things on their own, and bound to make a few mistakes (sometimes critical) along the way.

The employer/employee relationship is just like every other relationship you have with people. In a social environment, we make our minds up about people pretty fast. The same can happen in the workplace.

An orientation is not just about induction. Induction is about giving people tools (showing them how to fill in forms, going over processes etc.) While this stuff is important, it shouldn’t eat up all of your orientation time. Orientation is about *showing* your new manager what he can achieve with the tools and how to do it. It’s about enabling your manager to feel at home by letting him know:

- What is expected of him
- How to add value to the Company
- How to best communicate with his colleagues
- How to integrate as a team player

The following 7 reasons highlight why a proper orientation is the first step you must take to ensure the success of your new manager.

1. Ensures the new manager's first experience is positive

Having a structured orientation session gives you some control. Instead of leaving things to chance, you can ensure that the first impression the new manager gets of you and the Company is a positive one. The session also gives you the opportunity to reinforce to them that they made the right decision to join your team.

2. Increased comfort level = increased productivity

Ensuring your new manager feels comfortable at the outset will enable them to ease into their job quicker. It will go a long way to reducing the anxiety and stress most people feel when they start a new job.

3. New manager feels valued

Spending time on an orientation session shows the new manager that the company cares, and wants them to succeed. It also shows that you value the person, and that you are excited about her becoming a part of the team.

4. A proper introduction to the culture makes thing easier for everyone

Introducing your new manager to the workplace culture will not only help him out, it will make things easier for you and the rest of the staff as well. Even a great manager can be completely thrown off his game by the hidden rules of conduct we all adhere to in the workplace. Explaining the culture from the start will go a long way to making this period of adjustment smoother for everyone.

5. Improves employee morale

It is important to remember that you are not only hiring a new employee of yours, you are also hiring a new boss for a bunch of other staff. Bringing in a new manager can be a touchy thing. Will the staff accept their new boss or will they give her a hard time? Including the staff in the orientation process will help staff and manager to become more comfortable with each other quicker.

6. Lowers turnover

Without an orientation, the issues above aren't addressed. When you don't address these issues, you are setting your new manager up for failure. By conducting a proper orientation, you are setting her up for success and as a result, working to lower your turnover rate.

7. Lowers recruitment and training costs

The less people that leave your company, the less money you need to spend on recruitment and training.

C. Gaining cooperation from current staff

Before the new manager arrives, it is up to you to let the existing staff know that a new member is joining the team. Never include this announcement with information about the circumstances surrounding the previous manager leaving. These are two very different messages and should be done separately.

Make the announcement about the new manager positive and upbeat. Include a bit of information about him such as his past management experience. Staff may feel somewhat uneasy about having a new supervisor. Providing them with some information about their new boss (if done properly) will help ease their minds before the manager's first day.

D. Who should be involved in the orientation?

Only include those people you **need to** on day 1 of the orientation. The first day can be very overwhelming for a new person – especially if you are dealing with an external hire. There are lots of new people to meet and new information to process. The orientation should not be about giving your new manager as much information as you possibly can as soon as you can. Have a look at your organizational chart and check who that person's primary internal interactions are with. Make it a priority for her to meet those people first.

Use the following list as a guide for whom to include on day 1. Make sure you apply it to your specific situation; this list won't work for everyone.

- You – the orientation should always start out with the new manager sitting down with his boss
- Assistant managers
- Departmental supervisors
- Key line staff
- A peer he will be working closely with

Later on that week, your new manager can be introduced to:

- Regional office staff
- Other regional managers
- National staff, if you have them
- Key external people – suppliers, lawyers, insurers

E. Planning out the orientation process

1. Prior to Day 1

Your goals are to:

- Reduce the new manager's anxiety about her first day
- Prepare yourself
- Prepare your existing staff for the arrival of the new manager
- Prepare the employment package
- Prepare the new manager's work space

Complete the following tasks:

- **Call your new manager after she has accepted the position.**
Tell her how happy you are that she is joining your team. Ask her if she has any questions. Be friendly, upbeat and welcoming. Make sure you tell her when to arrive at work, where to park, who to ask for when she enters the building. Also remember to reinforce to her what the dress code is as most people tend to over-dress on the first day.
- **Have a look at your calendar.**
Try to keep your schedule as open as possible for that first week. You don't want your new manager to think that you don't have time for her, and it's difficult to know how much she'll need you.
- **Prepare the employment letter.**
Read it over – check for any errors. If you can send it out before hand, you should. If there's no time, be sure to have it signed on her first day.
- **Prepare the new hire's employment package.**
The package should include things like:
 - Payroll information (tax forms, direct deposit info)
 - Employment letter and job description
 - Company marketing material
 - Employee handbook
 - Organizational chart
 - Map of the building
 - List of internal contacts ie. Payroll, benefits, tech supportIf you can, send the package out to the new manager ahead of time.

- **Send out a new announcement to staff.**
Even if you already sent out an announcement about your hiring decision, send out another to key staff reminding them of the new manager's start date, and how they will be involved in the orientation.
- **Arrange for all necessary keys and codes to be created in time for her arrival.**
Talk to your IT person and make sure proper passwords get assigned. Get key's cut if necessary.
- **Ensure her new work space is clean and stocked with supplies.**
Clear out any of the previous manager's things. Make sure the computer is ready to go. Stock the desk with pens, paper, etc.
- **Pick a buddy your new manager can use as a resource.**
Identify a seasoned manager (preferably a peer) that will act as a coach.

2. Day 1

Your goals are to:

- Put the new manager at ease and make her feel welcome
- Put staff at ease with the new manager
- Clarify roles and relationships
- Explain organizational policies, procedures and structure
- Explain the corporate culture and your management style

Complete the following tasks:

- **Conduct a formal greeting, including an introduction to colleagues.**
Welcome your new manager into their new environment. Make sure that you tell her who she is getting introduced to. For example "This is Alison Chong our Maintenance Supervisor. She's been with us for 5 years" is more informative than just "This is Alison."
- **Go through the employee package.**
Keep a signed copy of the employment letter and offer your assistance in completing payroll/HR forms
- **Go through the organizational structure.**
Review the relationship between departments, the names of department heads, and how staff report to each other.
- **Explain job procedures, including duties and responsibilities**
Go through the job description with her. Make sure she is clear on what she is responsible for.

- **Briefly go through the organizational policies and procedures (employee handbook) together.**

Point out important policies and procedures. You don't need to go through it in great detail, just make sure the new manager goes through it all by the end of the first week, and comes to you with any questions. Some areas you probably want to include in your orientation discussion are:

 - Progressive discipline
 - Harassment/discrimination
 - Safety
 - Internet policies
 - Vacation days, sick days, personal days, how are they accrued?
Are they carried over?
 - How you call in sick
 - When pay cheques are issued

- **State your expectations regarding attendance.**

Explain hours of work, lunch breaks, coffee breaks, and overtime requirements. If flex time is an option make sure you talk about that too.

- **Explain any upcoming training you have scheduled.**

Go over the type of training required, the duration, as well as when and why it is scheduled.

- **Offer your assistance and encouragement.**

In the early stages of employment make sure you tell your manager specific time(s) each week when you can before questions or coaching.

- **Explain the workplace culture.**

Talk about management style (including yours), dress code, level of autonomy, how decisions are made (by individuals or by consensus) and implemented. Touch on how people communicate. Think about the style, frequency and methods you use to communicate to the people around you.

- **Conduct a tour of the facility.**

Take your new manager through the entire office. Be sure to think of point out where the washrooms are, the eating areas, and parking.

- **Discuss computer, email and voicemail logins.**

Help your new manager to get her workstation set up properly. Be sure to check back later to ensure everything is running as it should be.

- **Have the new manager sit down with key staff.**

See "Who should be involved in the orientation"

3. That week

Your goals are to:

- Ensure you and the new manager understand each other's goals, and how to achieve them
- Communicate your performance expectations
- Ensure the new manager understands how to communicate with you, their staff and the rest of the team.
- Make yourself available to communicate and coach your new manager through that first week.

Complete the following tasks:

- **Discuss your new manager's goals.**
Have a discussion about what you are looking for him to achieve and what he would like to achieve.
- **Go through the strategic plan.**
Read through your company's strategic plan together. If you don't have one, start talking about the kind of strategy you would both like to take for the area that person is managing.
- **Discuss career development opportunities.**
If there are courses your company is willing to pay for, talk about them.
- **Discuss any major problems that need to be dealt with right away.**
Are there any hot issues your manager should watch out for? Is there an interpersonal conflict between 2 staff members? Has your only night supervisor just given 2 weeks notice?
- **Discuss priorities.**
Ask yourself - 'what are the key business issues I want this manager to focus on?' Then communicate those.
- **Discuss the decision making process in your Company.**
What kind of authority does this new manager have? What types of decisions require approval? Expenses? People? Business functions? What kind can be made in isolation?
- **Discuss the preferred type of communication/reporting methods.**
Will you be looking for weekly reports? Monthly reports? Phone calls? Emails? Informal or formal meetings?

- **Discuss the current team your new manager will be supervising.**
What is the best way to manage his team? What kinds of thing do they respond well to? What do they not respond well to?
- **Show your new manager how to use equipment they might be unfamiliar with.**
Office equipment, technical systems, etc.
- **Discuss performance appraisal criteria.**
If possible, actually give your new manager a copy of the performance evaluation form. Explain when he will be evaluated, how he will be evaluated, and include the estimated time frame to achieve competency in the job. Explain how compensation and performance decisions are made.
- **Go over applicable provincial legislation.**
Legislation should include but is not limited to WCB and Employment Standards.
- **Get her in contact with her buddy.**
Ensure that the coaching relationship is set up and the two are communicating regularly.

4. Ongoing

Your goals are to:

- Ensure your new manager is settling into the culture.
- Ensure any performance problems are addressed early on.
- Continue the open and honest feedback you started within week 1.

Complete the following tasks:

- **Follow up regularly to see how she is doing.**
Offer feedback to your new manager. Encourage her to share any issues or concerns she has with her job, your relationship, etc.
- **Encourage your new manager.**
Give positive reinforcement whenever you can. If she does something well, say specifically what it is and how it contributes to the success of the business. For example saying "That was a great report you handed in last week" is not as valuable as saying "The report you handed in last week presented those figures really well. The charts were easy to read and the analysis was both concise and insightful. It will really help out our marketing manager when he's trying to come up with new promotional ideas."

- **Discuss problems.**
Be open and honest about any problems and frustrations your new manager might be having. These issues will only get worse as time progresses. This is the time she is learning what is acceptable within the context of your culture. The longer you wait to address the issues, the harder it will be for her to change.
- **Never undervalue your new manager's fresh perspective.**
Sometimes we have a tendency to ignore new ideas from new staff because we believe that their lack of experience renders them unable to contribute anything worthwhile at the start. Try not to get caught up in this line of thinking. Gaining an outsiders perspective is one of the most valuable things you get when you make an external hire part of your team. Listen to what they have to say – try not to discredit them based on their experience. Sometimes a fresh pair of eyes can see things an 'old timer' can't.

F. Summary

The orientation process is the first step in the training process. As you have learned, a successful orientation is more than just a day of introductions. While all of these responsibilities may seem onerous, you'll find them to be well worth your time and effort. A thorough orientation will ensure your new manager settles into the job quicker – heightening the chance of success and shortening the learning curve. Furthermore, it shows that you value your new manager and are willing to do whatever it takes to help them succeed.

Good luck!

If you have an HR challenge you think we can help with, please don't hesitate to contact us at Light the Lamp!

Orientation Checklist

	Responsibility	Done	N/A
<i>Prior to day 1</i>			
1	Call your new manager after she has accepted the position		
2	Have a look at your calendar		
3	Prepare the employment letter		
4	Prepare the employment package		
5	Put out an announcement		
6	Arrange for key and codes to be created		
7	Ensure new workspace is clean and stocked		
8	Pick a resource buddy for your manager		
<i>Day 1</i>			
9	Conduct a formal greeting		
10	Go through the employment package		
11	Go through the organizational structure		
12	Explain job procedures, duties, responsibilities		
13	Go through employee handbook/policies		
14	State attendance expectations		
15	Explain upcoming training you have scheduled		
16	Offer your assistance and encouragement		
17	Explain workplace culture		
18	Conduct a tour of the facility		
19	Discuss computer, email, voicemail logins		
20	Have the new manager sit down with key staff		
<i>That week</i>			
21	Discuss your new manager's goals		
22	Go through the strategic plan		
23	Discuss career development opportunities		
24	Discuss major problems that must be dealt with immediately		
25	Discuss priorities		
26	Discuss decision making process in your division		
27	Discussed preferred type of communication/reporting methods		
28	Discuss current team your manager will be supervising		
29	Show manager how to use equipment they are unfamiliar with		
30	Discuss performance appraisal criteria		
31	Go over applicable provincial legislation		
32	Put manager in touch with his/her buddy		
<i>Ongoing</i>			
33	Follow up regularly to see how he/she is doing		
34	Encourage the new manager		
35	Discuss any problems		
36	Do not undervalue his/her fresh perspective		

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