

[insert company logo here]

# New Employee Orientation Guide for Supervisors & Trainers (and checklist)

This guide will help provide instructions to complete certain actions that will help a new employee to succeed with their career here at **[insert company name]**. The more upfront preparation, the more successful you and the new employee will be. Remember – a new employee looks for immediate confirmation that joining **[insert company name]** was the right decision!

There is a pattern within each phase:

Review – what the employee has accomplished to date

Do – a list of actions

Discuss – critical to an employee's success

Plan - for the next phase

Every employee is different. You have the final say on whether to cover everything that is noted. The Supervisor and the Trainer, therefore, have increased levels of responsibility, but you also have an increased level of company support. Human Resources will be available to help support and answer questions as you progress.

## **Roles and Responsibilities of Supervisors and Trainers**

### **Supervisor –**

- Interviews and selects qualified candidate for employment position
- Assigns Trainer to employee
- Assists in evaluation of job performance and improvement plans
- Ultimately responsible for the employee's performance.
- Final resource for resolving issues that may arise and will address all performance problems through corrective action or dismissal.
- Plays an instrumental part in determining benefits and compensation.

### **Trainer –**

- Must have intensive knowledge and/or experience of the skills required for the position they are assigned to mentor.
- Gathers all historical information from the predecessor (if possible) to assist in transition.
- Reviews the Individual Employment Manual for their position with the new employee and assigns daily tasks based on these materials.
- Works closely with the employee on the completion of these tasks and reviews for accuracy.
- Evaluates the new employee for effectiveness of training and individual employee growth utilizing the evaluation forms and schedule set by the Company.
- There will be a partnership between the Supervisor and Trainer to support the new employee to achieve goals and personal development plans that are created with the employee.

Integration of a new employee into the company is divided into 6 phases:

Phase	Objective	Activity
<b>Pre-Employment – Supervisor and Human Resources</b>	<ul style="list-style-type: none"> <li>• Create the employee’s first impression of the Company.</li> <li>• Prepares employee for their first day</li> <li>• Complete required documentation</li> </ul>	<ul style="list-style-type: none"> <li>• Drug testing</li> <li>• Employment documents filled out</li> <li>• Assignment of Trainer</li> <li>• Assignment of Supervisor</li> <li>• Wage proposals signed</li> <li>• Employment Manual reviewed</li> </ul>
<b>First Day of Work – Supervisor, Trainer &amp; Employee</b>	<p>Welcome and Introductions!</p>	<ul style="list-style-type: none"> <li>• Meet with employee when they arrive</li> <li>• Introduce to team members</li> <li>• Workspace assignment</li> <li>• Meet with Trainer</li> <li>• Trainer and employee review work assignment and create a development plan</li> </ul>
<b>3-Week Review Supervisor, Trainer &amp; Employee</b>	<ul style="list-style-type: none"> <li>• Expectations</li> <li>• Accomplishments</li> <li>• Identify training needs</li> </ul>	<ul style="list-style-type: none"> <li>• Complete 3-Week Evaluation form with the employee</li> <li>• Discussion with the team on development plan</li> <li>• Review of next scheduled evaluation</li> </ul>
<b>8-Week Review SMART Goals Worksheet Supervisor, Trainer &amp; Employee</b>	<ul style="list-style-type: none"> <li>• Establishment of long term goals</li> <li>• Identification of strengths and weaknesses</li> <li>• Continue open communication</li> </ul>	<ul style="list-style-type: none"> <li>• Complete 8-Week Evaluation form with the employee</li> <li>• Introduction of Developmental SMART Goals worksheet</li> <li>• Discussion with the team on development plan</li> <li>• Review of next scheduled evaluation</li> </ul>
<b>6-Month Review Supervisor, Trainer &amp; Employee</b>	<ul style="list-style-type: none"> <li>• Pinpoint with further accuracy employee’s Performance Criteria</li> </ul>	<ul style="list-style-type: none"> <li>• Complete 6-Month Evaluation form with the employee</li> <li>• Discussion with the team on development plan</li> <li>• Review of next scheduled evaluation</li> </ul>

<p><b>Annual Review SMART GOALS WORKSHEET Supervisor, Trainer &amp; Employee</b></p>	<ul style="list-style-type: none"> <li>• In-depth analysis of employee’s effectiveness and possible revision to SMART goals that were established</li> </ul>	<ul style="list-style-type: none"> <li>• Complete Annual Review Evaluation form with the employee</li> <li>• Review of Developmental SMART Goals worksheet</li> <li>• Discussion with the team on development plan</li> <li>• Review of next scheduled evaluation</li> </ul>
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Scheduled performance reviews and documents should not take the place of an informal “check-in” to see how the employee is progressing. Frustrations tend on building quickly and become unsolvable if not quickly diffused. The “check-in” is meant to quickly address issues and can be done by phone, email or face-to-face. If the discussion becomes lengthy, schedule a formal meeting.

Check-In Meetings should consist of the basic questions:

- Does the employee adequately understand their role?
- Is the job what they expected? If not - what can be done to solve this?
- Are they having trouble fitting in – or having difficulty with any other employee?

By the end of the first month, the employee is getting comfortable with his surroundings and co-workers. This will be a good time to:

- Consider what is most important to you as far as your employee’s work objectives.
- Consider rewards and recognition and how to apply
- Listen to possible new ideas the employee may have that they bring from previous work experience.

The key to success with any new employee’s integration into the Company is **communication**. It starts with the interview and never ends throughout their career with **[insert company name]**. The facilitator of this essential task is YOU. As a trainer, a supervisor, a mentor - we build superior employees by actively participating in their development.

# New Employee Checklist

The following checklist provides a structure for giving new employees their first detailed view of [insert company name]. A copy will be kept on within the employee's personnel file.

Each Supervisor is responsible for the completion of the checklist; however, multiple department managers may be involved and share the responsibility for orienting the new employee. Supervisors have the flexibility to decide the best way for the new employee to receive required information.

As each activity is completed, please check the relevant box or indicate the date.

## **Pre-Employment Review -**

*(Complete prior to the first day of work)*

Reviewed by [insert name(s)]

Date \_\_\_\_\_

- Explanation of job duties and responsibilities
- Discussion of classification and wages offered (Salary versus Hourly)
- Trainer assigned: \_\_\_\_\_
- Supervisor \_\_\_\_\_
- Any special equipment required
- Who they will report to (name and phone #) \_\_\_\_\_
- When to report to work (date and time) \_\_\_\_\_
- Where to report for work (location) \_\_\_\_\_
- HR Documents \_\_\_\_\_

## **First Day of Work**

Date \_\_\_\_\_

Reviewed by [insert name(s)]

- Welcome - Introductions
- Work Station or Crew Assignment
- Work week and lunch times
- Time sheets
- Clothing - hand out and discuss pricing
- Provide copy of Employment Manual for job position
- Performance management - review of scheduled evaluations
- Attendance expectations: advance notice & policy for reporting absences or tardiness
- Pay Periods: schedule and when first paycheck will be received
- Anti-Harassment policy
- Parking, rest rooms, designated smoking areas, housekeeping
- Telephone procedures
- First Aid and Injuries
- Safety and emergency procedures

**3-Week Review**

Date \_\_\_\_\_

Trainer: \_\_\_\_\_

Supervisor: \_\_\_\_\_

Insurance benefit offering by Human Resources

Complete 3-Week Evaluation Form by Trainer and Supervisor

**8-Week Review**

Date \_\_\_\_\_

Trainer: \_\_\_\_\_

Supervisor: \_\_\_\_\_

Complete 8-Week Evaluation Form

Complete Annual Development SMART Goal Form

**6-Month Review**

Date \_\_\_\_\_

Trainer: \_\_\_\_\_

Supervisor: \_\_\_\_\_

Complete 6-Month Evaluation Form

**Annual Performance Evaluation**

Date \_\_\_\_\_

Trainer: \_\_\_\_\_

Supervisor: \_\_\_\_\_

Complete Annual Evaluation

Review Annual Development SMART Goal Form

**3-Year Performance Evaluation**

Date \_\_\_\_\_

Trainer: \_\_\_\_\_

Supervisor: \_\_\_\_\_

360 Degree Self-Evaluation

360 Degree Peer Evaluation