Introduction

What is ‘orientation’

“Orientation” means getting acquainted or getting familiar with your surroundings. Explorers orient themselves to an unfamiliar territory by comparing the landscape they can see to the features on a map. The faster an explorer can get his bearings and orient himself to a map, the faster he can get moving and arrive at his destination.

New employees go through orientation when they first arrive at a new job. They spend the first few hours, days, or even weeks getting acquainted with the landscape. A new employee doesn’t know the rules, policies, or procedures of a company when first starting. A new employee may only know a handful of co-workers or supervisors when first starting. A new employee might not even know how to get to a restroom when they first start with a company.

Orientation is the process an employee experiences when first starting with a company. They learn the rules, meet the people, and explore the facilities. In other words, they get familiar with the landscape.

Why should I care about orientation?

Most employees that quit a job quit within the first six months of employment. This is due to two major factors:

- Hiring practices. The wrong person was picked for the wrong job.
- On-boarding practices. The employee never successfully oriented and assimilated.

Several studies have shown that it is much more expensive to hire and train new employees than it is to retain the ones you already have. If a business invests time and effort into making the orientation easier for the employee, the employee has a better chance of getting acquainted with the new job and ultimately staying with the company longer.

Most orientation programs are loaded with information that the new employee needs to know, including policies, procedures, rules, equipment, and so on. Many programs fail to realize that it’s not just what you know, it’s who you know. A good orientation program not only gives the employee information about the company, it also introduces the employee to several key people. As a manager or leader of new employees, take time during orientation to make sure the new employee meets some key people in your organization to include:

- Several managers
- Several support staff personnel (HR, payroll, accounting, etc.)
- And many, many, peers

Who can use this manual?

Any person who is responsible for new employees can use this manual. This manual is written so that a new manager, supervisor, assistant manager, or even an experienced employee can orient a new employee.

What’s in this toolkit?

This toolkit features a few documents to help you orientate a new employee. The first is this manual, which acts as an instruction manual. Here are the others documents included in this toolkit:

- New Employee Orientation – Manual (This document)
- New Employee Orientation - Checklist
- New Employee Orientation - Emergency Contacts
- New Employee Orientation - Employee Information
- New Employee Orientation - Orientation Game
- New Employee Orientation – Employee Development Plan
What's in this manual?
This manual covers a few of the key subjects you'll need to orient your new employee:

- How to orient the new employee to your organization's vision.
- How to orient the new employee to his/her job expectations.
- How to orient the new employee to his/her compensation.
- How to orient the new employee to his/her new co-workers.

Traditionally, orientation programs spend a lot of time teaching the employee about the history and culture of a company. This manual will take a similar approach, but with better and faster results. This manual will help you explain how the employee's day-to-day activities are influenced by the company’s history and culture. This manual will show you how to set clear expectations for performance and behavior. Lastly, this manual will show you how to help your new employees build a network of contacts within the company.

Each section in the manual will explain how to tie day-to-day activities to the culture of your company. The end of each section will feature some checkpoints that you should complete before moving on to the next section. Attempt to complete the checkpoints in order. The checkpoints are organized so that the company’s vision, mission, and goals are explained to the employee as they relate to the employee’s daily expectations.

Dos and Don’ts

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<tr>
<th>Do</th>
<th>Don’t</th>
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<td>Orient new employees as a group. This isn’t a must, but it’s good, because then the new employees form bonds with their fellow new employees.</td>
<td>Don’t cram the entire orientation experience into one morning or afternoon. Split it up if you need to. Complete a section, and then have the employee complete some simple work or observe some other employees. Make a schedule that mixes up orientation and work, if needed.</td>
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<td>Create an employee orientation course or manual. You may not need to, but it helps for the employee to have something he/she can hold on to and reference, if needed. (Plus, you can take stuff from this toolkit, too!)</td>
<td>Don’t skip the touchy subjects that make you uncomfortable. If there is a portion of the orientation that you can’t do, get someone else to do it.</td>
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<td>Answer the employee’s questions. He/she may ask about things that are far down on the orientation list. It’s okay to go outside of the schedule, if necessary.</td>
<td>Don’t rush through orientation so you can get the new employee to work. Even if the employee has years of experience, remember that every company is different. They need to be oriented to your company, no matter where they came from.</td>
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<td>Complete orientation in several different settings. For one section, use the break room. For one section, use your office. For one section, use a conference room, etc. Change the settings for the employee so the entire experience isn’t in one place. Remember, you’re trying to orient the employee to his/her new surroundings.</td>
<td>Don’t assume anything. Each employee needs all pieces of the orientation process. Don’t assume that the employee is already familiar with a certain subject. That may come back to haunt you later.</td>
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<td>Get to know the new employee. Orientation is not just getting the employee familiar with the company. It’s about getting the company familiar with the new employee, too. (This toolkit includes an employee information sheet and emergency contact sheet you can use to learn more about the employee.)</td>
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Section 1: Orient the employee to The company Vision

There is no doubt that you’ve seen several orientation checklists and orientation manuals. It’s easy to get into a routine where you are explaining policy after policy to a new employee. After you explain policies and procedures for about 20 minutes, you may have lost them. Just checking items off a list will not ensure that the employee “gets it.”

The company leadership has probably tasked you with ensuring “for legal reasons” that each employee understands a particular policy. They might even have told you to have the employee sign a piece of paper confirming that he/she will comply with the policy. After a few of these, the employee may be a bit overwhelmed, or even scared. There is a big difference between protecting the company on paper and ensuring that the employee will comply with a policy. If you really want the employee to understand and comply with a policy, he/she needs to see how the policy fits into the big picture.

In this toolkit, we’ll explain how you’ll start from the top. You’ll show the new employee where your company wants to be, and how that employee can help the company get there. You’ll show the new employee how his/her day-to-day routine affects the success of the organization and his/her own pocketbook. Ultimately, employees will perform and behave according to (or better than) the standard because they want to.

Before you complete any paperwork, explain any policies, issue any equipment, begin any training, or even show the new employee around, welcome the new employee to the company. Thank him/her for making the decision to be a part of the team. Tell the employee that you’re glad he/she is here. Now, sit down, get comfortable, and start to have a conversation. Remember that a conversation goes two ways, not one.

Next, show the employee what is included in the orientation process. Give him/her a high-level overview of what will happen in the next couple of days. Explain where he/she will need to be, at what time, and how to get a hold of someone if he/she has questions. Let the employee know what he/she can expect from the orientation process.

Vision, Mission, Goals

Vision

Your first conversation with the new employee should be focused around the company’s vision. A vision is a statement that explains where your company wants to go. Sometimes a vision is a description of what the customer gets from you, or your desire for the customer’s success because of your product. A vision is like a wish statement for your company. Think of it as an overall description of what you want, why you exist as an organization, what you ultimately would like to provide to the customer, or a description of the environment that you would like to create for the betterment of your organization. Explain to the new employee that everything you do while you’re at work should contribute to this vision. If what you’re doing does not support this vision, then you shouldn’t be doing it.

Here is an example of vision:

“Company Name recognizes our obligation to build and maintain the trust of customers and the public in our products and our practices. Company Name will strive promote confidence in what we do and how we do it.”

Ask the new employee what he/she has heard or what he/she thought of the company before he/she started working here. An indicator of a good company is that public perception is close to or similar to the company vision. If the employee was close, let him/her know that he/she is working for a great company. If the employee was way off, or mentioned something negative, tell the employee that the company will need the help of every employee to achieve our vision.

Mission

A mission is a list of services that your team will provide to accomplish the vision. This is a description of how your team will help achieve the vision. Sometimes, it’s a general statement about what a certain team or department is responsible for doing. Show the new employee his/her team’s missions and explain how that contributes to the vision of your company.
Here is an example of a vision and some missions that support it:

*Company Name* will provide training, education and personal development for all people in the business of pork production to assure each person can:

- Produce safe food.
- Protect and promote animal well-being.
- Ensure practices that protect public health.
- Safeguard natural resources in all of our practices.
- Provide a work environment that is safe and consistent with our other ethical principles.
- Contribute to a better quality of life in our communities.

At this point in the process, you should have explained the vision and missions of the company. The employee may have questions about benefits, job hours, vacation, etc. Assure the employee that all of his/her questions will be answered today.

The main point here is to show the employee that the company's vision and mission are more important than anything else, including paperwork, nametags, uniforms, procedures, and even managers.

Accomplishing the mission and achieving the vision makes all things possible. Raises, benefits, time off, hiring more people, serving more communities, and helping employees lead better lives are all results of having achieved the vision. It's our reason for existence as a company.

**Goals**

 Goals are written for individuals. A goal tells an employee specifically what he/she is expected to do in order to accomplish his/her company's mission. If an employee meets or exceeds he/her goals, the mission will be accomplished, and the company's vision will become reality. We'll talk more about goals in the next section.

**Section 1: Checkpoint**

- Welcome the employee.
- Show the employee the orientation process.
- Explain how vision, mission, and goals work.
- Explain the company vision.
- Briefly describe company history and the location of corporate headquarters.
- Explain the missions of the team.
- Briefly describe the history of the building or team the new employee is on.

**Section 2: Orient the Employee to Job Expectations**

Each employee is expected to carry himself/herself in a certain manner. Each employee is expected to complete a certain amount of work at a certain level of expertise within a given time frame. This is called performance management. On a similar note, each employee is expected to behave in a certain manner. This is called conduct. Poor conduct may not have a direct effect on an employee's goals, but it may affect other people's ability to complete their goals, and it certainly does not contribute to the mission or vision of the company. Ensuring a clear expectation for good behavior and consequences for poor behavior is called conduct management. Performance management is a system to incent employee's knowledge and skills, while conduct management is a system to incent employees' behavior. Let's start with more about performance management.

**Performance Management**

Goals are the cornerstone of employee productivity. When an employee is rated annually, you compare his/her job performance to his/her goals. Generally, if he/she meets or exceeds his/her goals, he/she is rewarded (incented) with more money. If the employee doesn't meet his/her goals, the employee will receive extra supervision and instruction until he/she does meet his/her goals. As far as performance management is concerned, you're only dealing with employee knowledge...
and skill. If the employee continues to not meet goals, he/she may not possess the knowledge and skills annotated in his/her job description. Not meeting goals means that the employee is not contributing to the vision of the company. When an employee is not contributing to the success of the company, he/she may be let go. This is a business that wants to succeed, not spin its wheels. Everything an employee does should contribute to achieving the vision of the company.

**Job Descriptions**

Goals are based on an employee’s job description. Each position should have a job description. The job description explains what a person in this position needs to be able to do in order to help his/her team accomplish its mission. Job descriptions are not written for employees; they’re written for missions. A position’s goals are written to help the employee understand exactly what level of performance is expected. The goals also tell an employee what level of performance is unacceptable and what level of performance exceeds expectations.

**SMART Goals**

Goals should follow these SMART guidelines:

- **Specific.** Unacceptable, acceptable, and exceptional levels of performance are described in detail. An employee should know exactly what it takes to be considered successful.”
- **Measurable.** The performance of an employee needs to be measured with numbers or observations. Hard data needs to be assigned to each goal. At no time should an employee be given a certain rating because the manager “feels” like the employee is performing at that level.
- **Aligned.** Accomplishment of the goals will accomplish the team’s mission. Accomplishment of the team’s mission will achieve the vision of the company.
- **Realistic.** Goals need to be attainable by a properly-trained employee. A new employee should not be given the same level of expectations than a seasoned employee.
- **Time-bound.** A goal should have a deadline or timeframe for successful completion. Certain sustained levels of performance should happen within certain timeframes.(e.g.: per hour, by June 1, each day, etc.)

Here is an example of a farm manager’s goals in comparison to the company’s vision and team mission:

- **Vision: ”To provide a safe, wholesome food supply for the world.”**
  - Mission 1: Continually improve production methods that make us more efficient and desirable to our customers.
    - Goal 1: Perform routine business analysis. Conduct quarterly assessments of on-farm practices to determine their impact on the business.
    - Goal 2: Add goal here. Add SMART goal here.
    - Goal 3: Add goal here. Add SMART goal here.

**Performance Appraisals**

Explain to the employee how performance appraisals work. Let the employee know how often they are conducted and what to expect. Here are some general points about performance appraisals:

- Appraisals rate your performance, not you as a person.
- Appraisals compare your performance to a written standard.
- Appraisals never rate your performance on an area you were not aware of.
- Your manager should constantly be giving you feedback on your performance so the appraisal is never a surprise.
- Appraisal scores directly affect your raises and bonuses.
- Your manager wants you to succeed. You’ll be helped with goals you’re struggling with far before your appraisal comes up.
- Sometimes your conduct is a factor in your performance. If you conduct yourself professionally, that’s never a problem.
Development Plans

Each employee should take responsibility for developing to prepare for the next stage in his/her career. Managers should work with employees to ensure that the employee gets the support he/she needs to accomplish his/her development goals. Ultimately, it’s up to the employee to decide to develop.

As the orientation guide, you should explain to the employee how your company’s development plan guidelines work. Encourage the employee to start thinking now about where he/she wants to be in his/her career a year from now. How about five years from now? How about 20 years from now? What does the employee want to be doing? Does the employee wish to learn a special skill, or have a certain position within the company?

Encourage the employee to build SMART goals and share them with his/her manager. Remind the employee not to focus solely on weaknesses. Tell the employee to focus on strengths, as well. A good rule of thumb is to set two goals around areas the employee is not good at and two goals around areas the employee is really good at.

Take a look at the Sample Employee Development Plan in this toolkit. Let the employee have a copy, and explain some of the various parts.

Conduct Management

Conduct management is not about an employee’s knowledge and skill. It is about an employee’s behavior. Employees make choices about how to conduct themselves at work. Most of the time, employees conduct themselves in a professional and productive manner. When this is the case, employees are allowed to go about accomplishing their goals.

On the opposite end of the spectrum, when employees conduct themselves poorly, there are severe impacts to the mission and vision of the company. Unfortunately, one employee’s poor conduct can quickly hurt the mission of the team and the vision of the company.

Employees are given consequences when they conduct themselves poorly. Some consequences are minor, such as being sent home for the day. Some consequences can be major, like terminating an employee’s employment.

Conduct management is not about punishing bad employees. Conduct management is about ensuring that behavior is corrected. If behavior can be corrected, the path to the mission and vision of the company can continue. If behavior cannot be corrected, the path to the mission and vision of the company is blocked. Unfortunately, if a behavior cannot be corrected, an employee may be removed so that the mission can continue and the vision can be achieved.

Progressive discipline is a term that describes how management reacts to certain conduct. Some behavior is less tolerable that others. Some behavior can result in immediate removal, while others can be corrected with less severe consequences. If an employee continues to demonstrate poor behavior, the consequences become more severe over time, ultimately resulting in termination. Progressive discipline also describes how similar consequences are applied to different people (equitable treatment).

Section 2: checkpoint

Performance Management

- Explain performance management.
- Give the employee a copy of the job description.
- Give the employee a copy of his/her performance goals.
- Explain how each goal helps accomplish the mission, which in turn helps achieve the vision.
- Give the employee a copy of an appraisal form. Explain the appraisal process.
- Give the employee a copy of the sample Employee Development Plan.
Conduct Management

- Explain conduct management.
- Explain progressive discipline.
- Give the employee a copy of the most concerning policies, including policies that may bring about lawsuits or unfavorable media coverage if broken. You could consider these “vision-based policies.” They may include:
  - Animal welfare
  - Sexual harassment/assault
  - Workplace violence
  - Equal employment opportunity/discrimination
  - Any others (including more policies to be discussed later)

Section 3: Orient the employee to compensation

New employees will be concerned about how they’ll be paid. You’ll need to show them not only how much they’ll have ‘in-pocket,’ but what other compensation they’ll receive. Total compensation includes all of the benefits of a job, not just what is seen on the paycheck. That includes medical, dental, time-off, bonuses, and others.

Base Pay

Explain to the new employee that basic pay is the amount of pay he/she receives from the company. This is the amount the employee gets before deductions from taxes and benefits. Explain that local, state, and federal taxes are taken from the basic rate of pay automatically, based on what the employee claims on his/her W-4 form. (Now would be a good time to fill out the W-4 form with the employee.) Explain the difference between different withholding claims:

- Exempt
- 0, 1, 2, etc

(The fewer exemptions you claim on your W-4, the more income tax will be withheld from your pay. Therefore, 0 exemptions will cause more withholding than the 1 exemption.)

It may be a good idea to have a simulated pay stub or a pay stub with the name and personal information removed to show the employee just what taxes and fees are deducted automatically from the basic rate of pay. This is also a good time to fill out any state tax forms and the I9 form.

Work Hours

Along with showing the employee a pay stub, explain to the employee how work time is recorded with time cards, ID badges, punch-clocks, etc. Explain how to use any equipment associated with time cards and any policies regarding use of time. You’ll need to explain the policies surrounding vacation and sick leave, FMLA, and the policies regarding National Guardsmen and Reservists. Answer these questions:

1. What time do you need to be here? What time is considered late? Do you need to punch-in or be working by that time?
2. How does overtime work? Do you need permission? What about special work hours? Are there any rules about working late or on off-days?
3. When are the company holidays, and how are they paid?
4. What happens if the employee breaks the rules?
5. Which activities are considered “working,” and which are not?
6. How many days off does the employee get?
7. How many sick days does the employee get?
8. When are more days added? What happens if the employee runs out of time off?
9. What is considered “abusing” sick days or days off?
10. How should the employee call in sick or request time off?
11. What happens when the employee gets called to active duty? (National Guard or Reservists)
Total Compensation

Total compensation includes all of the benefits of a job, not just what is seen on the employee’s paycheck, including:

- Basic pay
- Medical insurance
- Life insurance
- Dental insurance
- Vision insurance
- Retirement plans
- Bonuses
- Vacation, holiday, sick leave, overtime
- Uniform, equipment allowances

Your organization may not have all of these benefits. You’ll need to be familiar with the benefits that are available to employees of your company. Explain that the company gives the employee a lot more than just base pay rate. Time off actually costs the company money, as does medical insurance, bonuses, retirement plans, etc.

Benefits

Do not give your new employee advice on how to invest or select benefits!

As a leader, your job is to familiarize your new employees with all of the benefits that are out there. Show them how to enroll in benefits, and give them the tools they need to understand their total compensation package, but don’t act as their advisor.

Each employee has a different lifestyle and life needs. It’s not your job to match up the appropriate benefits to their life needs. That is the employee’s responsibility. You should just act as a guide. Give the employee the information he/she needs to make the decision on his or her own.

Pay Increases

Each employee should be familiar with how pay increases are calculated. Some companies have a rate schedule based on the amount of time a person stays with a company. Some companies have raises linked to performance appraisals, while some have a combination of both. At this time, show the employee how your organization increases employee pay.

You may want to share with the employee your guarantee of equal pay for equal work. If you have time, share the basics of these federal laws:

- The Lilly Ledbetter Fair Pay Act of 2009
- The Civil Rights Act of 1964

Let the employee know that pay is treated equitably based on merit, and nothing else.

Section 3: Checkpoint

- Explain base pay rate
- Explain total compensation
- Show the employee a pay stub
- Explain “work hours” policies
  - National Guard and Reservist policies
  - Sick time
  - Vacation or time off
  - FMLA
  - Calling-in procedures
  - Holidays
- Complete tax and employment forms
  - W-4
• State tax withholding forms
  ○ Provide instructions and information on benefits enrollment
  ○ Explain how pay increases are administered
  ○ Explain fair pay

Section 4: Orient the employee to the staff
At this point in the employee's orientation, he or she has spent a considerable amount of time with you. You've given the employee a lot of information. Hopefully, you didn't try to cram it into a single morning or afternoon so you can get the employee to work as soon as possible! The new employee knows you now and you also need to introduce the employee to some people around the job site. Since you need to show the new employee around the place, why not combine the two events into one, and make it meaningful? Many organizations have created games for the new employees to participate in to help them meet the facility and staff.

This toolkit also comes with a sample orientation game. You can use the game rules or alter them to meet your needs.

Key Personnel/Places
Whether you decide to use a game or not, there are several key personnel and places that the employee will need to be familiar with. The goal here is not to introduce people and places, it’s to build the new employee’s support network. The new employee needs to know who to go to and where to go when he/she needs help. Here are some key people the employee needs to know:

Personnel
• Your boss, and the boss's boss (as far up the chain of command as you can go).
• The HR person.
• Trainers.
• The administrative staff (pay, benefits, scheduling, etc.).
• At least two people the employee will be working with daily.
• Another manager or supervisor besides yourself. (The employee needs to know who to go to if you're not around.)
• Committee heads (safety, diversity, planning, company party, etc., and any committees, clubs, or teams that you have at your facility).
• Any other key personnel that the employee may need to be in contact with.

Places
• Farm entry
• Showers
• Locker room
• Restrooms
• Manager’s office
• Break room or area
• Food storage and preparation
• Emergency escape routes/shelters
• Emergency equipment
• Phones
• Supply closets or areas
• Bulletin boards
• Mail and shipping stations
• Material Safety Data Sheets (MSDS)
Policies and Teamwork

Your company may have several other policies that we did not discuss previously. Instead of having you sit down and explain each policy to the employee, have the employee’s peers or some key personnel explain the policies. Use teamwork to get the new employee oriented to your company’s policies.

Sitting in a room with the same person going over policy after policy will get boring quickly. If you mix it up by having different people explain the different policies, the employee will be more likely to remember them and follow them. You could even build the policies into the game mentioned previously in this section.

**If you are having other employees explain policies, make sure they have a firm understanding and belief in the policy! The employee must understand why the policy is in place and must be able to explain that to the new employee.**

Here are some of the final checkpoints you will want to have covered with the employee:

- Biosecurity-shower in and out
- Visitor/phone call policy
- Confidentiality
- E-mail and Internet usage
- Security and facility access (including issuing of keys or badges)
- Safety (including issuing of safety gear or equipment)
- Parking policies
- Injury reporting
- Tobacco use policy
- Completion of any emergency contact sheets

Finishing up

After completing orientation, a new employee should have a feel for how the company operates. He or she may not fully understand how to complete the several duties of his/her job, but now the employee knows who to go for when he or she needs help. Hopefully, the employee has met some new friends, as well.

This toolkit has also provided you a printable or fillable sheet to use as a check-off for orientation. Feel free to alter it to meet your company’s needs.

Good luck! Remember that employees are not just check-off sheets… they’re people!

**Section 4: Checkpoint**

- Complete a facility tour:
  - Farm entry
  - Lockers work area
  - Showers
  - Restrooms
  - Manager’s office
  - Break room or area
  - Food storage and preparation
  - Emergency escape routes/shelters
  - Emergency equipment
  - Phones
  - Supply closets or areas
  - Bulletin boards
- Mail and shipping stations
- Material Safety Data Sheets (MSDS)
- Required postings (EEO, FMLA, etc)

Introduce key personnel:
- Your boss, and the boss’s boss (as far up the chain of command as you can go).
- The HR person.
- Trainers.
- The administrative staff (Pay, Benefits, Scheduling, etc.).
- At least two people they will be working with daily.
- Another manager or supervisor besides yourself. (The employee needs to know who to go to if you're not around.)
- Committee heads (safety, diversity, planning, company party, etc., and any committees, clubs, or teams that you have at your facility).
- Any other key personnel that the employee may need to be in contact with.

Introduce key policies:
- Biosecurity
- Animal care policy
- Visitor/phone call policy
- Confidentiality
- E-mail and Internet usage
- Security and facility access (including issuing of keys or badges)
- Safety (including issuing of safety gear or equipment)
- Parking policies
- Injury reporting
- Tobacco use policy
- Complete any emergency contact sheets