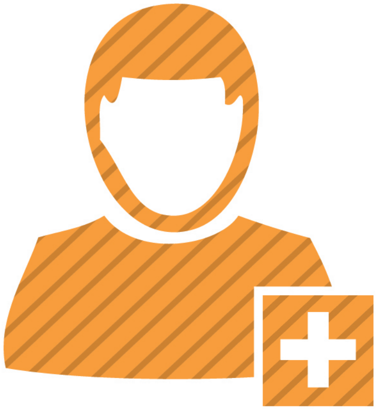
ATD Workshop Series

# NEW EMPLOYEE ORIENTATION
# training



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## KAREN LAWSON

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# The ATD Workshop Series

Whether you are a professional trainer who needs to pull together a new training program next week, or someone who does a bit of training as a part of your job, you'll find the ATD Workshop Series is a timesaver.

Topics deliver key learning on today's most pressing business needs, including training for communication skills, leadership, coaching, new supervisors, customer service, new employee orientation, and more. The series is designed for busy training and HR professionals, consultants, and managers who need to deliver training quickly to optimize performance now.

Each ATD Workshop book provides all the content and trainer's tools you need to create and deliver compelling training guaranteed to

- **enhance** learner engagement
- **deepen** learner understanding
- **increase** learning application.

Each book in the series offers innovative and engaging programs designed by leading experts and grounded in design and delivery best practices and theory. It is like having an expert trainer helping you with each step in the workshop process. The straightforward, practical instructions help you prepare and deliver the workshops quickly and effectively. Flexible timing options allow you to choose from half-day, one-day, and two-day workshop formats, or to create your own, using the tips and strategies presented for customizing the workshops to fit your unique business environment. Each ATD Workshop book also comes with guidance on leveraging learning technologies to maximize workshop design and delivery efficiency and access to all the training materials you will need, including activities, handouts, tools, assessments, and presentation slides.

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# Foreword

In 2002, we launched the ASTD Trainer's WorkShop Series—a collection of books authored by practitioners that focused on the design and delivery of training on popular soft-skills topics. The creation of this series was a departure for us. These workshops-in-a-book were created to help internal trainers expedite their program delivery by using appropriate and exceptionally designed content that could be adapted and repurposed.

These topics, dealing with issues ranging from customer service to leadership to manager skills, continue to be important training programs offered in companies and organizations of all sizes and across the globe. The ASTD Trainer's WorkShop Series has helped more than 60,000 trainers and occasional trainers deliver top-notch programs that meet business needs and help drive performance.

And while many things about the delivery of soft skills training have not changed in the last decade, there have been advances in technology and its use in training. So, when we began talking about how to refresh this popular series, we knew we needed to incorporate technology and new topics. We also wanted to make sure that the new series was cohesively designed and had input from author-practitioners who are, after all, the heart and soul of this series.

Inside *New Employee Orientation Training* by Karen Lawson, and each of the titles in the series, you'll find innovative content and fresh program agendas to simplify your delivery of key training topics. You'll also find consistency among titles, with each presented in a contemporary manner, designed by peers, and reflecting the preferences of training professionals who conduct workshops.

We hope that you find tremendous value in the ATD Workshop Series.

Tony Bingham
President & CEO
Association for Talent Development (ATD)
November 2015

# Preface

Although it was a number of years ago, I vividly remember my first experience as a new employee in a business setting. Hired as a management trainee for a bank, I arrived bright and early the first day, eager to start my new career. I reported to the manager of the main office who was nowhere to be found. It was clear that no one had any idea who I was or why I was there. When the manager finally arrived, he was unprepared. There was no workspace available for me and no plan. He managed to set up a table for me in a corner, handed me an enormous banking manual, and told me to start reading. That was the extent of my new employee orientation.

As a direct result of my experience as a new employee and then as an external consultant and training professional, I recognized a need for a process to help new employees adapt and assimilate more quickly and successfully into their new work environments. In my interviews with employees across several organizations and industries, I heard story after story of their unpleasant experiences as new hires during their first days, weeks, and months on the job. I also talked with those responsible for new employee training in their organizations to get an idea of what works and what doesn't. Based on these interviews, a literature survey, and my background in cooperative learning and interactive training techniques, I decided to design a more interactive and process-driven approach to new employee orientation programs. The result was *New Employee Orientation Training,* published in 2002. My goal then—and now with this new ATD Workshop Series book—is to provide a resource that can be used to create an effective new employee orientation program in any organization, regardless of size or industry. The agendas and activities are easily adapted to many types of employees and organizations. They can be used as stand-alone programs or as enhancements to existing programs. The step-by-step instructions with all the accompanying tools and resources make it easy for anyone to follow—whether you are a seasoned trainer, a human resources specialist, or a supervisor who must welcome and train new staff in your department.

You will notice that I have used very few slides in the workshop programs. My goal is to make new employee training programs highly interactive and participant centered. Consistent with adult-learning principles and best practice, the participants will learn by doing, not by being told.

I would not have been able to write this workbook without the help of others. I extend my gratitude to my clients and the many participants in my training programs who openly shared their experiences, insights, and suggestions with me. I am also grateful for the support, encouragement, and patience of Cat Russo, who had the vision for this workshop series, and Jacki Edlund-Braun, who helped move me along in the process. As with other book projects, this was a labor of love. I humbly hope that the agendas, activities, and tools in this book will help those who use them and those who benefit from their application to approach their everyday workplace experiences with renewed enthusiasm and a heightened sense of purpose.

Karen Lawson
Lansdale, Pennsylvania
November 2015

## Chapter 3

# Half-Day New Employee Orientation Workshop

**What's in This Chapter**

- Objectives of the half-day New Employee Orientation Training Workshop
- Ideas for preparing for the new employees' first day and before they even start
- Summary chart for the flow of content and activities
- Half-day program agenda

---

This chapter offers a half-day new employee orientation training workshop for all employees regardless of job level. It uses active training techniques in its design to keep the content relevant, meaningful, and interactive. Although a half-day workshop can't cover the same ground as the one- or two-day workshops, it can still offer time for participants to get to know each other, build rapport, and reflect on what they are learning. They will also have an opportunity to network with other participants so that they have ready lifelines to call when they return to the job.

The half-day workshop incorporates activities that engage participants, getting them out of their seats and actively participating in relevant and meaningful experiential activities, small group discussion, and practice. It presents a good mix of activities, presentations, personal reflection, and small and large group discussions.

Bear in mind that the workshop designs offered here are only one part of the larger onboarding program. The organization's overall onboarding approach as well as its goals, resources, and budget will drive the length of your training program as well as its content.

According to Talya N. Bauer, a professor at Portland State University in Oregon, onboarding has four distinct building blocks: compliance (basic legal and policy rules and regulations), clarification (understanding of the new job and related expectations), culture (sense of organizational norms), and connection (interpersonal relationships and information networks). Success depends on the degree to which organizations integrate these building blocks, with most organizations falling into one of three levels (Bauer 2010):

- **Level 1: Passive Onboarding**. Focuses on compliance, giving employees the rules (policies, procedures, and regulations). Neither culture nor connections is addressed. Research shows that approximately 30 percent of organizations of all sizes operate at this level.
- **Level 2: High-Potential Onboarding**. Includes both compliance and clarification and limited aspects of culture and connection. Only about 50 percent of all organizations have some culture and connection mechanisms in place.
- **Level 3: Proactive Onboarding**. Addresses all four building blocks and approaches onboarding as a systematic process. Only 20 percent of organizations achieve this level.

The workshops in this book are designed to address all four building blocks with varying degrees of depth. The half-day workshop covers compliance and clarification issues and briefly explores a few activities focused on culture and connection.

A half-day program is appropriate when

- Key leaders in the organization will support only an abbreviated program
- The targeted audience is 12 or more new employees
- Training facilities are not available for more than a half day
- Guest facilitators are not available.

Whether you choose a two-day, one-day, or half-day workshop format, time spent orienting your new employees will yield solid results in personal and organizational performance.

## Half-Day Workshop Objectives

By the end of the half-day workshop, participants will be able to

- Identify the policies and procedures that determine how the organization operates
- Identify where to go for information or answers to questions
- Identify the tangible and intangible benefits of working for the organization
- Identify the organization's core values
- Distinguish between ethical and unethical behavior in the workplace.

# Preparing for New Employees

Onboarding and orientation tasks may be performed by a variety of people and departments in different companies, depending on their size and staffing. You may be in charge of facilitating the orientation sessions, you may play a broader role in training and human resources, or you may be a supervisor or manager who must conduct orientation sessions for your department. Whatever your role, it is important that you know your organization's onboarding plan (see Introduction) and that you approach orientation as a process starting long before you conduct the orientation workshop.

## Before New Hires Start

In addition to sending welcome letters, save time by having new employees complete the required documents online prior to the first day on the job. Also send company information (digital or hard copies) ahead of time. Include product samples, if applicable.

Consider creating a video (either DVD or web link) that includes interviews with employees sharing what they like about the company, the reasons they stay, and brief stories about their positive experiences with co-workers or customers. The video could also show clips of employees having fun at company-sponsored events or participating in community service projects.

## Employees' First Day

New beginnings can be challenging so it is important that everyone is ready for the new employees' first day. Chapter 15 includes sample messaging, comprehensive checklists, and other helpful resources to help make employees' first day as positive and comfortable as possible.

The new employees will likely start their first day in the HR department, where they will receive security badges, access codes, parking stickers, computer passwords, phone numbers, and keys.

When the new employees reach their new departments, their work areas should include all the equipment, tools, and resources they need to do their jobs. Be sure to notify their co-workers that someone new is joining the team.

To make new employees feel welcome, assign a team member to be a "first day greeter." This assignment can rotate throughout the department. The greeter's job is to welcome new employees and show them where to hang their coats, where to find the restrooms and the lunchroom, how to operate the telephone system, and other important logistical information. Another nice touch is to assemble "welcome baskets" at new employees' desks or work areas that include items such as coffee mugs, snacks, maps, gift cards, and company logo items (pens, memo pads, mouse pads, key chains, and so on).

Even if someone else in your organization handles these activities, be willing to partner with them to help make new employees' integration into the organization as smooth as possible from the very beginning.

## Preparing Participant Materials

Printed materials are an important element of a new employee orientation program. Each new employee should receive a three-ring binder with the following materials and corresponding tab dividers:

- Mission, Vision, Values
- Organization History
- Organization Structure
- Products and Services
- *Employee Handbook*
- Resources and Contacts
- Helpful Information
- Checklists
- "Fun Stuff."

Many HR departments will already have a prepared binder or folder of information for new employees. You don't need to reinvent the wheel here. Start with what is already prepared and available from HR and then supplement with other resources as needed. Some of the information will be in the binders when they are distributed to the participants at the beginning of the program. Think of this prepared binder as the textbook. Throughout the workshop you will be adding additional handouts as your participants take part in the various learning activities. When you photocopy the handouts and other supplementary materials for the participants, remember to three-hole punch the resources if you are using binders.

Consider including organization mementos such as logo pens, pins, mugs, and product samples. You might also include the annual report, brochures, and maps. Create a fun, practical, and professional package that can also serve as a useful reference tool.

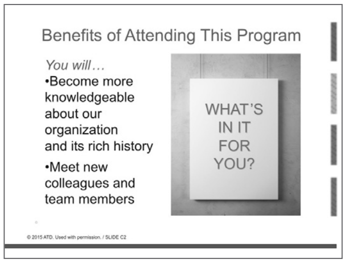
Instead of printed materials, you may choose to make the resources available on your organization's intranet. You can then ask the new employees to bring their laptops, tablets, or other electronic devices to the orientation session so they can access the material you are going to use in the program. Note, however, that if you choose this option, you will still need to print copies of the handouts to be able to conduct the learning activities.

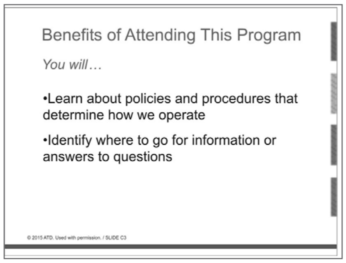
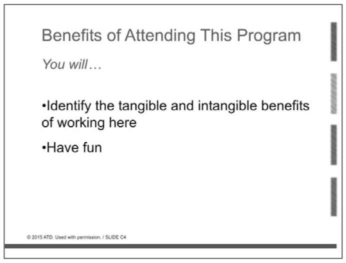
## Half-Day Workshop Overview

| TOPICS | TIMING |
|---|---|
| Welcome and Introductions | 10 minutes |
| Program Objectives and Format | 10 minutes |
| Learning Activity 1: Connections | 20 minutes |
| Learning Activity 7: All About Us | 15 minutes |
| Learning Activity 9: Organizational Structure Card Sort | 20 minutes |
| Learning Activity 14: In Search Of | 30 minutes |
| Learning Activity 15: What Not to Wear (or Do) | 20 minutes |
| **BREAK** | **15 minutes** |
| Learning Activity 17: Living Our Core Values | 35 minutes |
| Learning Activity 18: Taking the High Road | 30 minutes |
| Learning Activity 19: FAQs | 20 minutes |
| Learning Activity 22: Reflections | 10 minutes |
| Close: Final Q & A and Evaluations | 5 minutes |
| **TOTAL** | **240 minutes (4 hours)** |

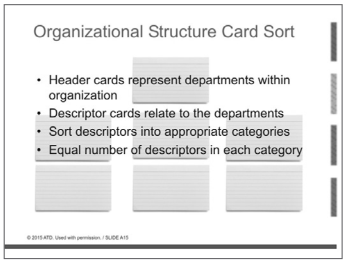
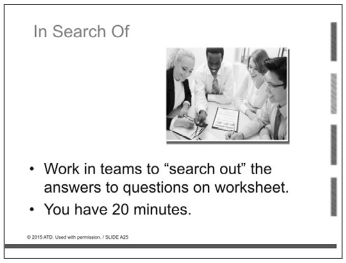
## Half-Day Workshop Agenda

### Half Day: (8:00 a.m. to 12:00 p.m.)

| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
|---|---|---|
| 8:00 a.m.<br>(10 min) | Slide 1<br> <br>ATD<br>Workshop<br>New Employee Orientation Training<br>Half-Day Workshop<br>© 2015 ATD. Used with permission. / SLIDE C1 | **Welcome and Introductions**<br>Begin your session on time by getting the participants' attention in a fun way (whistle, gong, or horn). Display the title slide. Introduce yourself (and other facilitators as appropriate) and welcome the participants. Note the usual housekeeping items such as restroom locations and breaks. |
| 8:10 a.m.<br>(10 min) | Slide 2<br><br>Benefits of Attending This Program<br>*You will…*<br>•Become more knowledgeable about our organization and its rich history<br>•Meet new colleagues and team members<br>WHAT'S IN IT FOR YOU?<br>© 2015 ATD. Used with permission. / SLIDE C2 | **Program Objectives and Format**<br>• **New Employee binder (or online equivalent)**<br>Use these next three slides to review the agenda and learning objectives with the participants by presenting them as the benefits of attending the workshop.<br>(Slide 1 of 3) |

| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
|---|---|---|
|  | Slide 3<br><br>Benefits of Attending This Program<br>*You will…*<br>•Learn about policies and procedures that determine how we operate<br>•Identify where to go for information or answers to questions<br>© 2015 ATD. Used with permission. / SLIDE C3 | In reviewing the benefits on this slide, take a minute or two to distribute and note the contents of their New Employee binders (which will include the *Employee Handbook*, policies and procedures, benefits information, and other resources specific to your organization).<br>If this resource is made available electronically, let the participants know that you will ask them to access that information at various points throughout the program. Explain that they will receive handouts to add to their folders or binders as part of the activities they will experience.<br>(Slide 2 of 3) |
|  | Slide 4<br><br>Benefits of Attending This Program<br>*You will…*<br>•Identify the tangible and intangible benefits of working here<br>•Have fun<br>© 2015 ATD. Used with permission. / SLIDE C4 | Wrap up your review of the benefits by asking, by a show of hands, how many participants have attended other orientation or onboarding programs during which presenters just talked at them accompanied by PowerPoint slides. Explain that this program is going to be different because they will be participating in interactive, engaging activities throughout the workshop. Encourage them to have fun with it!<br>(Slide 3 of 3) |
| 8:20 a.m.<br>(20 min) | Slide 5<br> <br>Connections<br>• Mix and mingle<br>• Find people who meet each criterion<br>• Have person sign sheet<br>• Person may sign sheet only one time<br>© 2015 ATD. Used with permission. / SLIDE A5 | **Learning Activity 1: Connections**<br>• **Handout 1: Connections**<br>Tell the participants that you want to give them an opportunity to get to know each other through several high-energy activities. This first activity will get them out of their seats, "connecting" with the other new employees in the workshop.<br>Debrief the activity using the discussion questions in the learning activity and award prizes to the winning participants (either first completed or most signatures). |

| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
|---|---|---|
| | | NOTE: For a time-saving variation, instead of conducting the Connections activity during the formal opening activities, give Handout 1 to participants as they enter the room. Ask them to mill around the room and collect signatures before the program actually gets started. (This has the added benefit of giving those who arrive early something to do.) Award prizes at the beginning of the opening activities. |
| 8:40 a.m.<br>(15 min) | Slide 6<br> <br>All About Us<br>Work with partner to fill in blanks on handout<br>© 2015 ATD. Used with permission. / SLIDE A13 | **Learning Activity 7: All About Us**<br>- **Handout 3: All About Us**<br>This next activity will help participants gain a better understanding of the organization and how they fit into the overall picture.<br>Mention that you're sure they come to their new positions with various degrees of knowledge about the organization. Remind them that they have discovered in the Connections activity that some people have friends or relatives who work for the organization and those insiders have probably provided some insight. Others, especially those who are new to the geographical area, may have limited knowledge based only on what they've read or learned about the organization through the review process. The All About Us activity will help them find out what they may or may not already know.<br>Use the instructions in the learning activity to conduct and debrief the activity. |

| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
|---|---|---|
| 8:55 a.m.<br>(20 min) | Slide 7<br><br>Organizational Structure Card Sort<br>• Header cards represent departments within organization<br>• Descriptor cards relate to the departments<br>• Sort descriptors into appropriate categories<br>• Equal number of descriptors in each category<br>© 2015 ATD. Used with permission. / SLIDE A15 | **Learning Activity 9: Organizational Structure Card Sort**<br>• **Handout 5: Organization Chart**<br>• **Handout 6: Division and Department Cards**<br>• **Tool 3: Sample Organization Chart**<br>• **Tool 4: Sample Cards**<br>Explain that every company has a particular and often complex organizational structure that can be confusing and overwhelming to new employees. Becoming more familiar with the organization's structure will help participants put into context the information they receive throughout the rest of the workshop.<br>Explain they will be learning about the organizational structure through an activity called a card sort. They will work in teams to figure out how the organization is structured. Emphasize you do not expect them to know this information already.<br>NOTE: Materials for this exercise require some customization to reflect your organization structure. See the learning activity for instructions for creating materials. |
| 9:15 a.m.<br>(30 min) | Slide 8<br><br>In Search Of<br>• Work in teams to "search out" the answers to questions on worksheet.<br>• You have 20 minutes.<br>© 2015 ATD. Used with permission. / SLIDE A25 | **Learning Activity 14: In Search Of**<br>• **Handout 8: In Search Of**<br>• **New Employee binder (or online equivalent)**<br>Introduce this activity by explaining that the organization is committed to helping everyone become happy, healthy, and productive employees. To that end, various policies and procedures have been put in place to support them.<br>Point out that the organization has developed an *Employee Handbook* to provide important information to ensure the well-being of all employees. Rather than listen to boring presentations highlighting the information in the handbook, they will work in teams to search out critical information. |

| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
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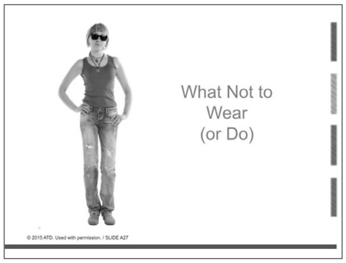
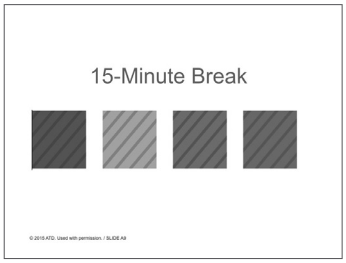
| 9:45 a.m.<br>(20 min) | Slide 9<br><br>What Not to Wear (or Do)<br>© 2015 ATD. Used with permission. / SLIDE A27 | **Learning Activity 15: What Not to Wear (or Do)**<br>- **Tool 6: Agree/Disagree Cards**<br>One troublesome aspect in today's work environment is figuring out the dress code. Every organization is different—what might be acceptable in one is totally unacceptable in another. What works for casual Fridays may not work for other days of the week. This activity will help participants better understand what is appropriate in this organization by speculating about what they perceive is appropriate and inappropriate attire and personal grooming in their new work environment.<br>In addition to clothing, there are also *behaviors* that are not acceptable in this organization. This activity will help also them avoid any uncomfortable situations that may arise simply because they weren't aware of the organization's expectations. Point out that the expectations regarding appearance and behavior could vary somewhat depending on the department or location.<br>NOTE: For this activity to be meaningful for your participants, you will need to use codes of dress and conduct that are specific to the organization. Create a list or slides that describe or show examples of appropriate or inappropriate clothing and behaviors. Follow the instructions in the learning activity to prepare for and conduct this activity. |
| 10:05 a.m.<br>(15 min) | Slide 10<br><br>15-Minute Break<br>© 2015 ATD. Used with permission. / SLIDE A9 | **BREAK** |

| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
|---|---|---|
| 10:20 p.m.<br>(35 min) | Slide 11<br> <br>Living Our Core Values<br> CORE VALUES<br>INTEGRITY<br>ETHICS<br>PRINCIPLES<br>ACCOUNTABILITY<br>© 2015 ATD. Used with permission. / SLIDE A29 | **Learning Activity 17: Living Our Core Values**<br>• **Organization's values statement (as a separate handout or part of the New Employee binder)**<br>To introduce this activity, begin by asking participants to share an example of a value and how that particular value affects behavior. Be prepared to offer an example to get them started. If someone values health, for example, that individual cultivates a healthy lifestyle by exercising, eating healthy foods, and getting enough sleep. Likewise, someone who values honesty would not cheat on his or her timesheet or income taxes.<br>Explain that organizations, like people, base the way they conduct business on a certain set of values. Sometimes these values are written; sometimes they are simply understood. This activity will help participants gain a better understanding of how the organization's core values relate to employee behavior.<br>Follow the instructions in the learning activity to conduct and debrief this team activity. |
| 10:55 a.m.<br>(30 min) | Slide 12<br> <br>Taking the High Road…<br> Business Ethics<br>Values are what we believe; ethics are what we do.<br>© 2015 ATD. Used with permission. / SLIDE C12 | **Learning Activity 18: Taking the High Road**<br>• **Handout 10: Taking the High Road**<br>• **Organization's ethics policy (as a separate handout or part of the New Employee binder)**<br>An organization's ethics policy has direct bearing on the behavior the organization expects from its employees. Ask participants for examples of ethical issues they may have heard about recently in the news. Be prepared to offer your own example. This pairs activity will help them become more familiar with the organization's ethics policy. |

| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
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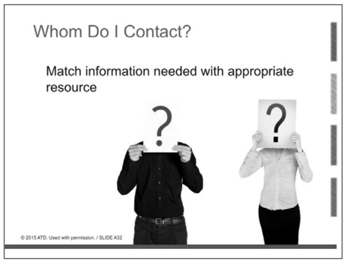
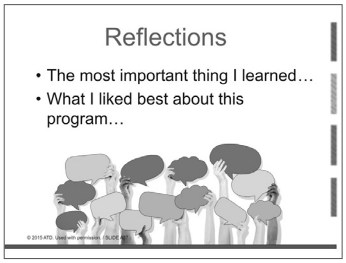
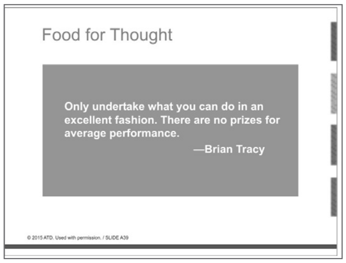
| 11:25 a.m.<br>(20 min) | Slide 13<br><br>Whom Do I Contact?<br>Match information needed with appropriate resource<br>© 2015 ATD. Used with permission. / SLIDE A32 | **Learning Activity 19: FAQs**<br>• **Handout 11: FAQs**<br>Introduce this segment by mentioning to participants that one of their challenges as new employees is to identify where to go or whom to contact when they have a question. To make that process easier, they now will create their own user-friendly resource list. |
| 11:45 a.m.<br>(10 min) | Slide 14<br><br>Reflections<br>• The most important thing I learned…<br>• What I liked best about this program…<br>© 2015 ATD. Used with permission. / SLIDE A37 | **Learning Activity 22: Reflections**<br>Tell participants that you would like them to think about the most important thing they learned in this program and what has been the most meaningful piece of information or experience for each of them. The reflections activity will help them focus on the true value of the workshop. |
|  | Slide 15<br><br>Food for Thought<br>Only undertake what you can do in an excellent fashion. There are no prizes for average performance.<br>—Brian Tracy<br>© 2015 ATD. Used with permission. / SLIDE A39 | **Food for Thought**<br>You will want your participants to leave the workshop feeling confident and inspired to do their best in their new positions. Share this quotation on excellence from development expert and author Brian Tracy as a transition to the workshop closing. |
| 11:55 a.m.<br>(5 min)<br>End at 12:00 p.m. | Slide 16<br> <br>We Wish You Success!<br>Are You Ready?<br>© 2015 ATD. Used with permission. / SLIDE A40 | **Close: Final Q & A and Evaluations**<br>• **Assessment 1: End-of-Program Questionnaire**<br>Share any final details and follow-up plans (highly recommended). See Chapters 10 and 11 for ideas to follow up the training with support and activities.<br>Be open to answering any final questions about the concepts presented in the workshop.<br>Distribute the evaluations (Assessment 1 or your own form) and ask participants to complete them before they leave the workshop. Remind them that their insights help facilitators get better.<br>Thank them for their participation and wish them the best of success! |

## What to Do Next

- Determine the schedule for workshops; reserve location and catering you may wish to provide.
- Identify and invite participants.
- Review the workshop objectives, activities, and handouts to plan the content you will use.
- Prepare copies of the participant materials and any activity-related materials you may need. Refer to Chapter 16 for information about how to access and use the supplemental materials provided for this workshop.
- Gather tactile items, such as Koosh balls, crayons, magnets, Play-Doh, or others to place on the tables for tactile learners. See Chapter 8 for other ideas to enhance the learning environment of your workshop.
- Confirm that you have addressed scheduling and personal concerns so that you can be fully present to facilitate the class.

## Additional Resource

Bauer, Talya N. (2010). "Onboarding New Employees: Maximizing Success." *SHRM Foundation's Effective Practice Guidelines Series*. Alexandria, VA: SHRM.

Buy the Book