



**Canadian  
Manufacturers &  
Exporters**

# Orientation Guide



Developed with the  
support of



[WWW.INVISIONEDGE.COM](http://WWW.INVISIONEDGE.COM)

## Introduction – How to provide an overview for onboarding new employees

The purpose of a standardized Orientation Program is to ensure that new employees are made familiar with their job roles, the organization and with the people they will be working with to achieve quality service. Of equal importance is the opportunity to reflect the Company's values and priorities to new employees while defining where the individual fits in within the organization.

There are three components to the Orientation Program including:

- an introduction to the organization
- an introduction to the work area
- an orientation follow-up

The Orientation Program must include regularly scheduled feedback and communication between the immediate supervisor and the employee.

### DOWNLOAD OTHER SUPPORT TOOLS FROM THE HR TOOLKIT AT:

<http://mb.cme-mec.ca/manitoba/main/people---skills.html>

- Health and Safety 101
- Job Description
- Orientation Guide – Skills for Success @ Work
- Performance Management
- Recruitment and Selection
- Introduction to Lean Tools – Video
- Introduction to Problem Solving – Video
- [iCME](#) (job posting & job search)
- Reading Writing Math Assessment



## **I. Introduction to the Organization**

This function is conducted by the Human Resources representative and is generally the first contact in the employee and Company relationship. Included in this component of the Orientation would be providing information about:

1. the history of the Company.
2. the Mission Statement and strategic plan of the Company.
3. the structure of the Company (i.e. organizational chart) highlighting goals and objectives
4. the services the Company provides
5. how and who provides the services and where the new employee fits into and participates in providing such services
6. the Pledge of Confidentiality
7. the benefit plans (undertaken in conjunction with Finance Manager).
8. The layout of the facility (tour of the office/facility).

## **II. Introduction to the Program Area**

An employee would then be introduced to their immediate supervisor at which point job specific information is obtained. The employee and supervisor should review the Orientation Checklist (see attached) which outlines specific areas which must be reviewed during the orientation. Once the checklist is completed it will be signed by the employee and the immediate supervisor and placed in the employee's Human Resource file.

Areas which would be covered in this component of the orientation include:

1. introducing the new employee to co-workers.
2. a tour of the work area(s).
3. defining Goals and Objectives
4. clarifying how the employee's job fits in with others working in the area.
5. a comprehensive review of the employer's job description including performance standards.



6. a review of how and when Performance Appraisals occur.
7. an introduction to applicable Policies and Procedures.

### **III. Orientation Follow-up**

The follow-up of the Orientation Program is a necessary component of a successful orientation. Systematic follow-up of the Orientation Program after a week, a month and a quarter of a year helps assess information needs of the new employee. The Orientation Checklist (see attached) should be reviewed at each of these intervals by the immediate supervisor and employee.

An Orientation Report (see attached) at the end of the Orientation Checklist outlines meeting dates as well as a written review of the employee's orientation. The Orientation Report will be completed by the employee and will then be reviewed by the immediate supervisor and employee.

The final "orientation" meeting would occur at the 3 month mark, following date of hire, where the employee provides feedback about the overall Orientation Program. The opportunity for the immediate supervisor and employee to further discuss job related issues is also available (i.e. how future job performance will be measured).

The information received regarding how the employee perceived the overall Orientation Program will be reviewed by the Company in an effort to evaluate the effectiveness of the Orientation Program.

(Insert Company Name)  
**NEW EMPLOYEE ORIENTATION CHECKLIST**

<b>EMPLOYEE NAME:</b>	<b>START DATE:</b>
<b>POSITION:</b>	<b>MANAGER:</b>

<b>BEFORE FIRST DAY</b>			
<input type="checkbox"/>	When and where to arrive		
<input type="checkbox"/>	Where to park		
<input type="checkbox"/>	Whom to report to		
<input type="checkbox"/>	Let other staff know new employee is starting		
<input type="checkbox"/>	Work station, office materials or other equipment are ready		
<input type="checkbox"/>	Computer and telephone access are prepared or scheduled		
<b>FIRST DAY</b>			
<input type="checkbox"/>	Review the Employee Handbook		
<input type="checkbox"/>	Review culture (company background), values, Vision/Mission statement		
<input type="checkbox"/>	Assign “buddy” employee(s) to answer general questions		
<b>POLICIES</b>			
<input type="checkbox"/>	Review key policies		
	<table style="width: 100%; border: none;"> <tr> <td style="width: 50%; vertical-align: top;"> <ul style="list-style-type: none"> <li>• Anti-harassment</li> <li>• Vacation &amp; sick leave</li> <li>• Holidays</li> <li>• Time and leave reporting</li> <li>• Overtime</li> </ul> </td> <td style="width: 50%; vertical-align: top;"> <ul style="list-style-type: none"> <li>• Personal conduct standards</li> <li>• Progressive disciplinary actions</li> <li>• Security</li> <li>• Confidentiality</li> <li>• Safety – General Review of Health &amp; Safety Program, employee’s role, worker rights and responsibilities, fire safety and emergency Evacuation Plan with identified wardens. Location of H &amp; S Communication Board (HR policy manual), and identification of committee members.                             <ul style="list-style-type: none"> <li>- How to raise H &amp; S concern or report a hazard</li> <li>- Reporting of unsafe acts or conditions</li> </ul> </li> <li>• Consider WHMIS, PPE list, Drug &amp; Alcohol policy (Zero Tolerance), Ergonomics, Equipment Certification</li> <li>• Performance Review</li> <li>• Dress Code</li> <li>• E-mail &amp; Internet use</li> </ul> </td> </tr> </table>	<ul style="list-style-type: none"> <li>• Anti-harassment</li> <li>• Vacation &amp; sick leave</li> <li>• Holidays</li> <li>• Time and leave reporting</li> <li>• Overtime</li> </ul>	<ul style="list-style-type: none"> <li>• Personal conduct standards</li> <li>• Progressive disciplinary actions</li> <li>• Security</li> <li>• Confidentiality</li> <li>• Safety – General Review of Health &amp; Safety Program, employee’s role, worker rights and responsibilities, fire safety and emergency Evacuation Plan with identified wardens. Location of H &amp; S Communication Board (HR policy manual), and identification of committee members.                             <ul style="list-style-type: none"> <li>- How to raise H &amp; S concern or report a hazard</li> <li>- Reporting of unsafe acts or conditions</li> </ul> </li> <li>• Consider WHMIS, PPE list, Drug &amp; Alcohol policy (Zero Tolerance), Ergonomics, Equipment Certification</li> <li>• Performance Review</li> <li>• Dress Code</li> <li>• E-mail &amp; Internet use</li> </ul>
<ul style="list-style-type: none"> <li>• Anti-harassment</li> <li>• Vacation &amp; sick leave</li> <li>• Holidays</li> <li>• Time and leave reporting</li> <li>• Overtime</li> </ul>	<ul style="list-style-type: none"> <li>• Personal conduct standards</li> <li>• Progressive disciplinary actions</li> <li>• Security</li> <li>• Confidentiality</li> <li>• Safety – General Review of Health &amp; Safety Program, employee’s role, worker rights and responsibilities, fire safety and emergency Evacuation Plan with identified wardens. Location of H &amp; S Communication Board (HR policy manual), and identification of committee members.                             <ul style="list-style-type: none"> <li>- How to raise H &amp; S concern or report a hazard</li> <li>- Reporting of unsafe acts or conditions</li> </ul> </li> <li>• Consider WHMIS, PPE list, Drug &amp; Alcohol policy (Zero Tolerance), Ergonomics, Equipment Certification</li> <li>• Performance Review</li> <li>• Dress Code</li> <li>• E-mail &amp; Internet use</li> </ul>		
	<ul style="list-style-type: none"> <li>• Emergency procedures</li> <li>• Visitors</li> </ul>		

<b>ADMINISTRATIVE PROCEDURES</b>			
<input type="checkbox"/>	Review general administrative procedures		
	• Office/desk/work station	• Telephones	
	• Keys	• Building access cards	
	• Mail (incoming & outgoing)	• Conference room	
	• Shipping (couriers etc.)	• Picture ID badges	
	• Business cards	• Expense reports	
	• Purchase requests	• Office supplies	
<b>INTRODUCTIONS AND TOURS</b>			
<input type="checkbox"/>	Give introductions to department staff and key personnel during tour		
<input type="checkbox"/>	Tour of facility, including:		
	• Restrooms	• Bulletin board	• Kitchen
	• Mail rooms	• Parking	• Coffee/vending machines
	• Copy centres	• Printers	• Cafeteria
	• Fax machines	• Office supplies	• Emergency exits and supplies
<b>POSITION INFORMATION</b>			
<input type="checkbox"/>	Introduction to team		
<input type="checkbox"/>	Illustrate the big picture, how each position relates to the others on the team		
<input type="checkbox"/>	Demonstrate how the team relates to other departments or areas of the operation		
<input type="checkbox"/>	Review initial job assignments including employee limitations, employer expectations and training plans (See Tips for Workplace Skills – link)		
<input type="checkbox"/>	Review job schedule, hours and break times		
<input type="checkbox"/>	Review payroll timing, time cards (if applicable), and policies and procedures		
<input type="checkbox"/>	Introduce Lean Practices and encourage ownership and continuous improvement		
<input type="checkbox"/>	Review Job Hazard analysis and Safe Work procedures, equipment, and requirements		
<input type="checkbox"/>	Review department specific Health & Safety – Chemicals, PPE, MSDS & First Aide. Location of eyewash stations, fire extinguishers, first aid kits and identification of first responders.		
<input type="checkbox"/>	Review Problem Solving techniques – See Problem Solvers @ Work and (Video Link)		
<b>COMPUTERS</b>			
<input type="checkbox"/>	Hardware and software reviews, including:		
	• E-mail	• Microsoft Office System	• Databases
	• Intranet	• Data on shared drives	• Internet

<b>COMPLETE PAPER WORK</b>	
<input type="checkbox"/>	Have employee sign up for company's benefit programs
<input type="checkbox"/>	Have employee sign up for payroll
<input type="checkbox"/>	Review their salary
<input type="checkbox"/>	Explain when (paydays) and how they get paid
<input type="checkbox"/>	Benefits
<input type="checkbox"/>	Make sure appropriate income tax and benefit forms are signed
<input type="checkbox"/>	Provide basic training (such as WHIMIS and review Health and Safety 101)

(Insert Company Name)  
**ORIENTATION REPORT**

<b>EMPLOYEE NAME:</b>
-----------------------

Briefly comment on your orientation progress. If you feel there are areas which could be made clearer for you, please indicate in the comment section. You will be meeting with your immediate supervisor for three orientation follow-up meetings. If you have any questions, do not hesitate to contact your immediate supervisor for assistance at any point during your orientation.

<b>ONE WEEK MEETING</b>	<b>DATE:</b>
<b>EMPLOYEE SIGNATURE:</b>	<b>SUPERVISOR SIGNATURE:</b>
<b>COMMENT:</b>	
<b>ONE MONTH MEETING</b>	<b>DATE:</b>
<b>EMPLOYEE SIGNATURE:</b>	<b>SUPERVISOR SIGNATURE:</b>
<b>COMMENT:</b>	
<b>THREE MONTH MEETING</b>	<b>DATE:</b>
<b>EMPLOYEE SIGNATURE:</b>	<b>SUPERVISOR SIGNATURE:</b>
<b>COMMENT:</b>	

For the three month meeting, please comment on the overall Orientation Program (i.e. differences between job expectations and job realities, weaknesses in the Orientation Program, what has been help and what has not, etc.).

**Supervisor:** Please send Orientation Report to Human Resources for filing.