Why is an induction process important?

This Induction checklist is designed to provide all managers with a guideline as to the required times and activities that must be covered when inducting new staff members. As this programme is a guide only, please do not attempt to cover all of the induction requirements. As a manager it is your responsibility to ensure that new staff members are informed and trained effectively in that role or position.

Why is an induction process so important?

A good induction is introducing a new employee into the company so that they can settle in quickly and make an effective contribution as quickly as possible. The initial few weeks are crucial and can say a lot about our company. Everybody need an induction whether they are part-time or temporary, although these maybe shorter in length depending on the role.

The way in which a new employee is welcomed and introduces to the company and work teams has a long lasting impact on:

How they view the company and their employer.

The value they place on their new role that they have been recruited into.

Their personal level of job satisfaction

Good induction is highly correlated with high retention rates.

The first three or four months is known as the ‘ induction crisis’ in the highest number of resignations take place during this period.

Poor induction leads to poor morale in other staff members and can result in:

Unhappy employees

Unnecessary stress

Mistakes

Under performance of staff

More time spent managing poor performance issues

Increased additional recruitment costs

Increased training costs through a high staff turnover

Damage to our companies image

ACTIVITY

WHO IS RESPONSIBLE?

NOTES

COMPLETED

TO BE COMPLETED WEEKS BEFORE START DATE

Employee confirms acceptance of offer and start date to HR and appointment to meet supervisor/Team leader.

SUPERVISOR/ TEAM LEADER

Once the employee has confirmed acceptance of employment offer, manager is to phone to

Welcome employee.

Ask whether there are any queries from the employee.

Advise of location and where to park vehicle.

MANAGER

Download Induction Kit and prepare an employee induction file.

MANAGER

Send employee the offer letter and a welcome pack which will include a:

Welcome letter

Company Handbook with mission statement and company values.

Organisation Chart

Product catalogue and pricelist

Map

FAQ's

MANAGER

Manager to develop and refine induction plan specific for the position.

Ensure that the appropriate Managers and staff have input into the plan.

MANAGER

Go through (and alter if necessary) the checklist and Induction kit.

MANAGER

Send out the final revised copy of the induction plan to the employee.

MANAGER

Advise and brief the team of the new employees and arrange a buddy. E-mail the remainder of the company advising of the new employees and request to make them feel welcome.

MANAGER

Phone the employees a day before the start to ensure that everything is in order and request employees to bring the required information and documents such as:

IRD details

Photo ID

Drivers licence

Passport

Advise security of the arrival of the new employees and where they are to park.

MANAGER

THE FIRST DAY:

0900

Make that you are there to meet and greet the employees, or arrange for someone to do on your behalf.

MANAGER

Introduce the employees to each other, team members and colleagues. The manager will be available for early arrivals.

SUPERVISOR/ TEAM LEADER.

0910

Go through the induction plan with employees.

SUPERVISOR/ TEAM LEADER

0930

Complete the contract signing and complete all of the relevant paperwork including citing and obtaining copies of passports, driver’s licences and complete IRD applications.

SUPERVISOR/ TEAM LEADER

0940

Complete paperwork for the company vehicles. The company vehicles are to be issued after the three day training programme.

SUPERVISOR/ TEAM LEADER

1000

Discuss your role as a manager and or team leader. Cover such issues as access, car parking, security and staff facilities. Cover the plan for the rest of the week. Discuss and answer any questions and issues.

SUPERVISOR/ TEAM LEADER

1010

Take employees on a brief tour of the company and show new employees where all of the facilities are i. e. Toilets, fire escapes and staffroom.

SUPERVISOR/ TEAM LEADER

1030

New Employees are handed over for the training programme.

SUPERVISOR/ TEAM LEADER

Question 2

Identify and then describe what methods could be used for conducting a training needs analysis for the sales representative.

In identifying training needs it is important to ensure that the training has specific measureable and realistic targets. We must be able to identify and define the training needs of both the organisation and its people. This exists between the organisation, the department and the individual. Once the organisation has defined its business goals and processes we can then determine the resource needs. Each department of the organisation should identify its objectives and needs, including the type of jobs and how many employees it requires. It will also need to determine what range of skills will be necessary to meet the goals of the organisation.

In this case our pharmaceutical company requires four new sales representatives to service the required area.

The individual employees have two types of training needs. One of those needs is an immediate necessity for skills and knowledge to perform the required tasks. The other type is a longer term need of personal development, within the organisation.

To identify training needs of the four new sales representatives we need to analyse the requirements of the organisation, the task and the person. We need to answer the following questions:

What sort of knowledge, skills and other abilities are required for the four new sales representatives?

What must the four new sales representatives be able to achieve, to meet the performance requirements of the job?

On an organisation level we will need to establish:

Where in the organisation is training needed?

Who exactly needs the training and of what type?

Answers to these questions will help our company to identify the performance or training gap. The training gap is the shortfall between the underperformance and the current performance level that needs to be bridged, possibly by training. But there is the possibility that training alone is not the answer. Any one of many factors maybe a cause of the performance gap, other than the individual’s lack of skills or knowledge. Examples of this could be inadequate instruction, misunderstanding of the employee’s job role and responsibilities as well as poor supervision.

There are several ways to assess an individuals needs such as a formal performance reviews of current and past sales team members. Performance reviews (of both present and past employees) are a valuable source of information of an individuals training needs and further development. Direct observation of the sales team allows a manager or training officer to observe how individuals perform a task. It also allows an assessment of any weaknesses or training needs. The job description itself could be the basis of manager and employees to discuss the performance gap and agree whether, and what training is needed.

Direct discussion with the current sales team members may be the quickest and most accurate way to determine a person’s training needs. This is dependant on a reasonably supportive work environment where the discussion is not judgmental. People will usually be honest about their needs – and most people know themselves better that anyone else can.

Written surveys, questionnaires or interviews received from the current sales team can be used to determine training needs. Problems can happen if they include technical terms or language which the potential trainees do not understand. But the major problem with self analysis is that people can’t express whether they have a need if they are not aware of it! The risk is that people will seek all sorts of interesting or exciting training and development opportunities, which have little or no relevance to their present jobs or performance. People often select courses that they would like to attend in the false belief that training and courses are compatible to become disappointed when they are not permitted to pursue them.

The analysis of a persons training needs should go beyond an assessment of current performance. The four other questions that must be answered are:

Are the individuals (the four new sales representatives) trainable?

How should the training programme be tailored toward the four new sales representatives?

How can we ensure that the four new sales representatives understand the training and its objectives?

How will we manage the transfer of the new learning back into the workplace?

In assessing the employee’s performance and job needs is only part of the training needs analyses. The first step must be to analyse the performance requirements of the job or tasks and identify the knowledge, skills and attitudes (KSA’s) which are needed for the effective job performance. This can be done by systematic job analysis and job description. In some situations, it can be done relatively easily by bringing together a small group of people together who know the job well and asking them the range and levels of skills and knowledge required for acceptable performance.

COMPETENCIES AND STANDARDS

Two comparable developments are the growth of the ‘ competency’ concept and the establishment of New Zealand’s National Qualifications Framework. These have been important influences on the identification and definition of training needs.

There is no real agreement on an exact definition of competency. It does seem to include all of the inputs of both cognitive and behavioural aspects in which a person needs for successful performance outcomes. There is a strong focus on the person in the job, rather than the requirements of the job itself. That is the stage at which the competency concept differs from the traditional approaches to training needs analysis. These definitions are so broad that they seem to include any factor that might be relevant to a person’s performance in a job (Rudman, 2002).

Question 3:

The induction programme has been set up in such a way as to allow it to start on any day of the week and run 3 days from there.

Day One:

Start time 10 am till 10: 45 am:

Welcome and introductions:

The CEO or another senior manager greets the new staff members and welcomes them to the company.

As part of the welcome the person conducting the welcoming will inform everyone where the exits are, just in case. This should be done in case there is an emergency. A morning tea is provided and it is a chance to meet those members of the senior management team that are on site at the time.

The session has started at 10. 00 am so the CEO or other senior management can catch up on any urgent matters that have arisen that morning and for the staff to be able to relax and not rush to be there early on in the morning. The additional benefit of a later start on day one, is that the new employees can find their feet and settle in a little before the commencement of the program and their induction process.

New staff are asked to briefly introduce themselves and provide a brief synopsis or run down of their relevant work experience.

10: 45am till 11: 00am

A quick break time to allow the new staff a chance to refresh themselves and gather themselves for the next part of the programme.

11: 00am till 1: 00pm

In this part of the programme the employees are introduced to the company's safety and employment / HR policies. They are given a copy of the company policies to read through and a copy to keep of some of the more important ones.

In this section some of the policies that will be covered include:

The Health and Safety policies that cover the workplace, Details of the contract that both parties are bound by,

The policies around their employment agreement and issues associated with advancement within the company.

The polices around the use of the company cars,

Travel policies and use of the company credit cards are all covered in this section as well.

This time is also used to make sure the new employees are introduced to the companies polices and are informed as to how and where to get more information if they require it or need clarification on any of the policies. The employees must be informed of these things as it could impact on the running of the business and also put themselves at risk if they are not familiar with these policies.

1: 00pm till 1: 30pm

The employees are given a chance to eat and refresh themselves before the afternoon session starts.

1: 30pm till 2: 00pm

The staff are issued with their effects for carrying out their duties. They are given their phones, product catalogue, as well as anything else they need to carry out their role within the company. They are also required to sign for the property that they receive from the company. This is to ensure that the company knows where their property is as well as for insurance purposes. All their logon information for accessing the company intranet is also provided to them.

2: 00pm till 3: 00pm

The staff are introduced to their manager and fellow team members. This gives the new employees a chance to talk and establish relationships with the people that they are going to be working with. They can also ask any questions and get any helpful information about the processes and the people that they are likely to be dealing with.

3: 00pm till 4: 00pm

The new employees are shown around the company's site and advised where essential tools and equipment are to be found. This gives the new employees a chance to get to know where everything is located and how to get around.

4: 00pm

A quick refresher test is completed to ensure that new staff are retaining essential safety (or similar) information and a start time and location advised for day 2. The new staff are permitted to go home early so their first day is somewhat relaxing and because they will often be working beyond their normal business hours. This also gives the people running the induction programme a chance to set things up for the next day as it will be heavily loaded information day for them.

Day Two:

8: 30am till 10: 30am

This part of the programme is where all the pointed training occurs for the new employee's job.

A run down of the basic groups that the pharmaceuticals are broken down into.

The groups are explained as to the reasons why they are grouped that why.

Broad explanation of what the groups do in relation to help people.

Any special handling requirements of the meds or any restrictions that are placed on the groups by the manufacturer or any Government department.

10: 30am till 10: 45am

The employees are given a chance to refresh themselves.

10: 45am till 1: 00pm

In this session the specific details of the medicines are gone explained. (Part One).

Details of both the technical and brand names of the medicines are explained.

Pack sizes are talked about.

Restrictions are reiterated again as they are VERY important in our line of work.

What the medicines look like and how to identify them.

As there are a lot of medicines to go through, the explanation is broken up into two parts. One today and the other session will be carried out first thing in the morning.

1: 00pm till 1: 30pm

A lunch break in provided for here, so the employees can get some food and make comfort stops.

1: 30pm till 2: 30pm

In this session one of the company’s experts in the field of development is brought in to talk about what they do and how the development of the medicines occurs. This is to give the employees a chance to learn about something else that happens within the company and provides them an insight as to how much work goes into producing the medicines.

2: 30pm till 3: 00pm

Someone from customer services is brought in to talk about what their job involves and how they process orders or queries. This is to make sure that the new employees have a better idea about the process is around ordering and what process the orders go through and so they can better understand the people that they talk to when dealing with their orders.

3: 00pm till 3: 30pm

Someone from the sales team is brought in to do a talk about their role and things that have helped them in performing their role within the sales team. This is a chance for the new employees to see what it is going to be like and how to deal with them being away from the office and their on site support network. This is also a chance for the new employees to ask any questions about their role with someone who deals with what they are likely to encounter when they are on the road.

3: 30pm till 3: 45pm

Another comfort stop is provided here for the new employees.

3: 45pm till 4: 30pm

Some basic training is given in the use of the custom ordering application that is on the phone that has been issued to the employees. As this is a custom application, they are given a brief run down on how to use the application and will be given more in depth training on the last day of the induction course.

4: 30pm till 4: 45pm

A quick test to check the recall is given to see if the information has been taken in.

4: 45pm till 5: 00pm

A chance for any questions to be answered and if there are none then they can leave for the day. The people running the course will then set up for the last day.

Day Three:

8: 30am till 10: 30am

Part two of the explanation of the companies pharmaceuticals are explained and run through again in more detail.

Any details that the new employees from yesterday did not understand or needed more information about, are talked about here.

The family relationship between the pharmaceuticals is discussed and the hierarchy of those groups are explained.

Any competitor's products that do a similar job are also talked about. This is to give our employees industry knowledge and a tactics to help sell our products.

10: 30am till 10: 45am

The comfort stop and teabreak is provided here for the new employees.

10: 45am till 1: 00pm

Training on the use of the custom ordering application is given in this section.

The way in which the application interacts with the software at the current site is explained.

All the information that is stored about the customer and how to retrieve it so they can have as much knowledge about the people that they are going to deal with.

How to make notes about the business that they have just dealt with, (so anyone can recall that information if the employee is of sick or away).

The way to enter orders and process them so the information is received and actioned as quickly as possible.

The ways of checking that what you have entered as an order, has in fact been placed and actioned.

How to check on the status of and order. This will give the employee all the necessary information about the order, including when it was place, when it was dispatched, ETA and any out of stocks.

1: 00pm till 1: 30pm

A break for lunch and comfort stops are provided.

1: 30pm till 4: 00pm

In this section we are concentrating on role playing and getting the new employees familiar with the way to interact with the customers. Members from the sales tem will help role play out several different situations with the new team members. They will cover some of the following areas:

Cold calling on new businesses.

How to introduce themselves when they meet someone for the first time.

How to sell our products to customers.

What happens if they are meeting with a hostile customer?

How to process orders by interacting with the customers systems.

How to deal with any issues surrounding the order process.

Any information that the team members think will help them do their jobs better.

4: 00pm till 4: 30pm

Some revision work is done to make sure that they feel that they are ready to start out and help sell the companies products. It is a chance to see if they understood what was explained to them and that they can apply that knowledge.

4: 30pm till 5: 00pm

The newest team members are asked to provide feedback on the induction programme. They are asked to comment on things such as:

Did they find the induction programme helpful?

Do they feel that they have been given enough information to do the job properly?

Was there enough time to process the information?

Was the speed to fast or slow?

Is there anything that they feel should have been included or should be excluded when the course is run again?

This is so we can monitor the course and make sure that employees are getting the right information and that they feel that it was worth while doing it.

Question 3 (cont'd):

Day One:

GlaxoSmithkline 3 Day Training Programme

Time

Training Event

Persons Involved

Completed

10am-10: 45am

Welcome and introductions

Senior Management

10: 45am-11: 00am

Comfort Stop

11am-1: 00pm

The companies policies are introduced to the employees

HR Manager or other such person

1: 00pm-1: 30pm

Lunch

1: 30pm-2: 00pm

Employees are given their personal effects for carrying out there jobs

Sales Manager or other such person

2: 00pm-3: 00pm

The new employees are introduced to their fellow sales team members

Sales Manager

3: 00pm-4: 00pm

A tour of the company site is carried out

Sales team members

4: 00pm-4: 15pm

Quick refresher test is conducted

Sales Manager or trainer

4: 15pm

Staff are let go early

Sales Manager or trainer

Day Two:

Time

Training Event

Persons Involved

Completed

8: 30am-8: 45am

Quick refresher test carried out

Sales Manager or trainer

8: 45am-10: 30am

Training on the types and groups of pharmaceuticals is carried out

Sales Manager or trainer

10: 30am-11: 00am

Comfort Stop

10: 45am-1: 00pm

Specific training is carried out on the nature of the companies range of pharmaceuticals. (Broken into 2 parts. Part One today)

Sales Manager or trainer

1: 00pm-1: 30pm

Lunch

1: 30pm-2: 30pm

Company expert is brought in to talk about their involvement in developing the pharmaceuticals

Company Expert

2: 30pm-3: 00pm

A member of the customer services team is brought in to talk about their role and what they do

Customer Services team member

3: 00pm-3: 30pm

A sales team member is brought in to talk to the new employees and answer any questions that they might have

Sales team member

3: 30pm-3: 45pm

Comfort Stop

3: 45pm-5: 00pm

Basic training on the phone ordering application and a recall test is carried out. Chance for questions to be asked by the employees

Sales Manager or trainer

Day Three:

Time

Training Event

Persons Involved

Completed

8: 30am-8: 45am

Quick refresher test carried out

Sales Manager or trainer

8: 45am-10: 30am

Specific training is carried out on the nature of the companies range of pharmaceuticals. (Broken into 2 parts. Part Two today). Also allows questions to be answered from the previous days session

Sales Manager or trainer

10: 30am-10: 45am

Comfort Stop

10: 45am-1: 00pm

Employees are given training on our custom ordering application. They are taught the interaction and how it generally works

Sales Manager or trainer

1: 00pm-1: 30pm

Lunch

1: 30pm-3: 45pm

Role playing is carried out to help the new employees learn about the way they are expected to interact with our customers

Sales Manager or trainer

3: 45pm-4: 00pm

Comfort Stop

4: 00pm-4: 30pm

A revision session is carried out to make sure that they are ready to go out and sell our products

Sales Manager or trainer

4: 30pm-5: 00pm

The newest sales team members are asked to fill out a feedback form which will be used to keep the course as relevant as possible

Sales Manager or trainer

Question 4

From this 3-day programme, write a detailed training plan that could be used for a 20 minute practical training session for a new sales representative, which deals with handling customer’s enquiries concerning products and service matters.

Your answer must include main clear and measurable objectives of the training plan.

In developing training for our new sales representatives it is necessary to firstly assess and identify the training needs for the new sales representatives which deals with handling customer’s enquiries concerning products and service matters.

We have developed the following programme to assist the sales team:

Handling Customer Inquiries:

Introduction

The way our organisation handles enquiries is to firstly, gather sufficient information to determine what the customer needs. This is important in meeting the principles of the customer first:

We identify our customers' needs.

A number of additional requirements are related to information gathering and data management:

We always ascertain customers' existing relationships with other relevant service providers before providing services to avoid duplication.

We have access to up-to-date customer information which is updated accurately at regular and agreed intervals

Efficient and effective enquiry handling along with the initial problem assessment is of upmost importance from our companies perspective. We need to consider a series of customer enquiry handling processes that will ensure that customers are handled consistently and appropriately. Customer needs are determined in a professional and impartial manner and that are provided with an accurate and timely response that can be utilised in the future.

This approach will help you to develop on-going successful relationships with your new customers. The way that you handle enquiries from your existing customers is also important if you want to maintain long-term working relationships with them. Handling enquiries successfully will also provide you with repeat business as customers will want to contact you again if they are impressed with the service provided.

From a Customer's perspective, the customers' first contact and experience of your organisation is critical in creating a good impression of you, your ability to understand their needs and providing them with the service that they need. Your strategies for responding is important to customer perceptions of the way in which you handle customer contact. If this is unsuccessful the customer may become disillusioned and decide to cease the relationship. Poor handling processes which can involve passing customers from one department to another, without an explanation whilst failing to understand what the customer requires can make customers feel you are unprofessional in your approach. Further the customer can feel that you do not have services which can support their needs (Customer First UK, n. d.)

Regardless of how good your organization's customer service is, it is inevitable that at some stage you will have unhappy customers.

That is why it is important that you have a system in place for handling customer complaints.

By being proactive you will not only show your customers that you value them but you will also gather a lot of information that can be used for internal and external benchmarking and improvement.

To be able to handle complaints pro-actively, you must look at your actual service levels and compare them with customer expectations. It is fair to say that complaints usually follow when service levels fall below the organization’s performance standards. Knowing this, your company should put in place an effective complaint management system.

As well as being better prepared, you will have added customer value by creating a service that the customer may not be expecting, such as immediate response to customers concerns and grievances, or offering compensation such as a discount or money off voucher. This kind of resolution with a customer can often result in increased customer loyalty and satisfaction.

A complaints handling system can also be used when a service provider knows in advance that they will be unable to meet customer expectations. For example, a transport company can plan in advance how it will handle the knowledge that one of the scheduled routes will be late.

There is nothing worse than lack of information for customers in their hour of need. A proactive system must take this into consideration and have robust lines of communication built into to it.

Everyone in the company should be aware of the complaints process and understand the importance of swift action.

Complaint handling software can be used when dealing with a large number of complaints, or a consumer complaint form can be designed to speed up

a manual process.

Proactive managing of complaints involves empowerment of customer facing employees. An honest, consistent response together with a plan to put

things right will satisfy all but of the most difficult customers.

Other skills that need to be demonstrated are good listening skills, the ability to think on one's feet and flexibility.

Listening to customers and getting to the origin cause of what went wrong can be benefi