



HR Toolkit:

# New Hire Orientation



Provided by: **Risty Benefits**

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# Introduction

Effective new hire orientation plays a pivotal role in integrating employees into the company culture, setting expectations and providing essential information for a successful start. It sets the tone for the employee's experience and influences their productivity and long-term commitment to the organization.



Gallup reports that only 1 in 8 employees strongly agree that new hires at their organization receive an excellent orientation and onboarding experience.

Employee orientation serves as the initial welcome of new hires to a company, marking the beginning of their employment journey. Orientation provides a general overview of company policies, procedures and culture. It is one of the first steps in the overarching onboarding process, which encompasses a series of events and training sessions. This process is designed to facilitate new hires' transition into their roles, help them evolve into successful and productive employees, and acclimate them to the organization. As part of the broader onboarding process, orientation is critical to setting up a new hire for success—and often tenure—at the organization.

This HR Toolkit aims to assist employers in designing, executing and refining their new hire orientation programs to ensure a seamless and effective onboarding experience for employees on their first day. It provides a broad overview of new hire orientation and should not be construed as legal advice. Due to the legal complexities involved in new hire orientation, employers are encouraged to seek legal counsel to address specific concerns or issues.

# New Hire Orientation

As a component of the onboarding process, orientation is the initial phase of an employee’s journey within a company. It’s when the employee is introduced to their role, team and the organization as a whole on their first day. Orientation serves as the foundational step in acquainting new hires with essential information pertinent to their role and workplace, laying the groundwork for successful integration into the company culture and environment.

The primary objectives of orientation include familiarizing new hires with the company’s mission, values, policies and procedures; introducing them to their roles, responsibilities and colleagues; and fostering a sense of belonging within their team and the organization. Effective new hire orientations aim to accomplish the following key actions:

- ◆ Complete essential employment paperwork.
- ◆ Communicate company policies and expectations.
- ◆ Help new hires transition into their new roles.
- ◆ Answer any questions or concerns that arise.

A standardized orientation program ensures that all new hires across an organization receive a consistent experience on their first day.

The Wynhurst Group found that new employees decide whether they feel at home in the first three weeks at a company, and 4% of new employees leave a job after a disastrous first day.



## The Importance of Orientation

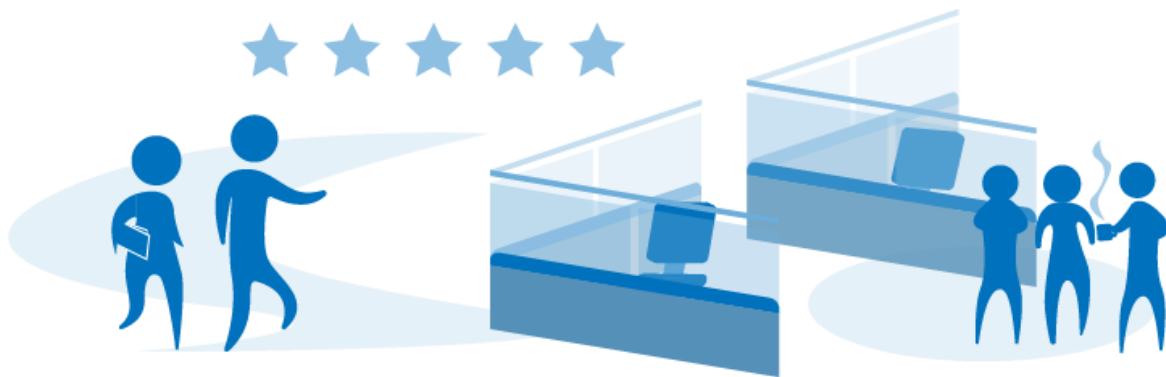
Employers don’t get a second chance to make a first impression with new hires, which is why the process is critically important for organizations. A successful orientation process can yield the following benefits for employers:

- ◆ **Improved productivity**—Orientation provides new employees with a clear understanding of their roles, responsibilities and performance expectations. When employees know what is expected of them from the beginning, they can focus their efforts more effectively and are likely to become productive more quickly.
- ◆ **Enhanced performance**—Many orientation programs equip new hires with the skills and knowledge necessary to excel in their roles. When employees understand their roles and have the necessary resources and support, they are more likely to perform well, contributing to the organization’s overall success.

## **New Hire Orientation**

- ◆ **Welcoming company culture**—Orientation can make new hires feel welcome and help alleviate any stress, anxiety or first-day jitters. When done effectively, the process also introduces employees to the company culture, facilitates connections with colleagues, clarifies expectations and provides support.
- ◆ **Strong sense of belonging**—New hire orientation helps foster a sense of belonging and camaraderie among employees by introducing them to the company culture and values. When people feel like they belong at work, they are more productive, motivated and engaged, which can help them contribute to their fullest potential.
- ◆ **Reduced turnover**—A comprehensive new hire orientation program can increase employee engagement, satisfaction and commitment to the organization. Effective orientation and onboarding programs can lead to higher retention rates as employees feel more supported and connected to the organization.
- ◆ **Cost savings**—By reducing turnover and improving productivity, new hire orientations ultimately save organizations money in recruiting and training and reduce lost productivity costs. Orientation can also help organizations satisfy legal requirements (e.g., mandatory paperwork completion and employee handbook review) and avoid related penalties.

A formal orientation process ensures that new hires receive consistent information about company policies, procedures and expectations, reducing the likelihood of misunderstandings or conflicts down the line. Overall, new hire orientation is crucial in setting the stage for positive employee experience and long-term success with the organization.



The next several sections of this toolkit outline the process for planning, developing and maintaining a new hire orientation program.

# Designing the Orientation Program

In designing an effective orientation program, it's imperative to first assess the specific needs and requirements of the organization. This involves a comprehensive analysis of various aspects that can be achieved with the following steps:

- ◆ **Identify key competencies.** First, it's important to determine the essential skills, knowledge and abilities (commonly known as KSAs) required for success within the organization. These competencies may vary depending on the nature of the roles and the organization's strategic objectives. By identifying key competencies, the orientation program can be tailored to address the specific skill sets needed for new hires to excel in their positions.
- ◆ **Understand organizational culture.** Organizational culture plays a significant role in shaping employee behavior, attitudes and performance. Understanding the organization's culture, values and norms shapes the orientation program to align new hires with the company's values and foster a sense of belonging and engagement from day one.
- ◆ **Define clear objectives and goals.** Based on the identified organizational needs, HR professionals should clearly define the objectives and goals of the orientation program. These objectives should outline what the employer aims to achieve through the orientation process, such as accelerating new hire productivity, enhancing employee retention and promoting cultural integration. These objectives should align with the company's goals and values while addressing the specific needs of new hires. Setting clear objectives ensures the orientation program is focused and purposeful, ultimately contributing to the organization's overall success.
- ◆ **Identify key personnel involved.** Successful onboarding requires collaboration from various individuals within the organization. Therefore, it's imperative to identify key personnel who will play a role in facilitating orientation sessions, providing mentorship and offering support to new hires throughout their integration process. There must also be a collaboration with the IT department to set up email addresses, laptops and other necessary IT equipment.

By assessing an organization's unique needs, employers can design a tailored orientation program that effectively prepares new hires for success. This proactive approach ensures that the orientation program addresses the specific needs and priorities of an organization, setting the stage for new hires to thrive in their roles at the company.

## Creating a Comprehensive Orientation Program

Once careful consideration and assessment have gone into planning for an orientation program, employers can move forward with developing a formal program. Consider the following key components of a collaborative orientation program:



**Welcome and introduction to the company**—The initial welcome sets the tone for the entire onboarding experience. Make new hires feel valued and appreciated by providing a warm welcome message from senior leadership and an introduction to the company's history, mission and vision.

## **New Hire Orientation**

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**Overview of company culture and values**—Introduce new hires to the unique culture and values that define the organization. This includes highlighting the company’s core beliefs, guiding principles, and expected behaviors to help new hires understand what it means to be part of the team.



**Introduction to company policies and procedures**—Equip new hires with the knowledge they need to navigate company policies, procedures and expectations. Cover topics such as code of conduct, employee benefits, time-off policies and any other relevant guidelines to ensure clarity and compliance from the start. This may be done by sharing a formal employee handbook.



**Introduction to the team and key stakeholders**—Foster connections by facilitating introductions between new hires and their team members, managers and other key stakeholders. Encourage open communication and collaboration to help new hires feel supported and integrated into their new work environment.



**Role-specific training and expectations**—Provide role-specific training and clarify performance expectations to acclimate and prepare new hires for their positions. Outline job responsibilities, goals, performance metrics, and any necessary technical or job-specific skills training to ensure new hires are well prepared for their roles. It’s also important to share relevant job descriptions, training materials and manuals.



**Benefits and perks overview**—Educate new hires about the comprehensive benefits and perks offered by the company, including health care options, retirement plans, wellness programs, and any additional incentives or perks that contribute to a positive employee experience. It’s also important to share any extracurricular groups that contribute to company culture, such as team sports teams, employee resource groups, or learning and development opportunities.



**Safety and security protocols**—Prioritize the safety and well-being of new hires by reviewing essential safety and security protocols. Cover emergency procedures, workplace safety guidelines, and any relevant security measures to ensure new hires feel secure and prepared in their new work environment.



**Q&A and feedback sessions**—Foster open dialogue and address any questions or concerns new hires may have during orientation. Provide opportunities for new hires to ask questions, share feedback, and seek clarification on any topics covered during the orientation sessions. Furthermore, employers regularly audit their orientation programs and incorporate new hires’ feedback to make the programs as effective as possible. Program optimization will be explained in depth in a later section.

Consideration must also be made regarding the location of orientation. For example, if the employee will be working remotely, all aspects of the plan should be able to be conducted virtually and asynchronously, as needed. In-person orientation will require workspaces, conference rooms and other workplace locations. In a hybrid workplace, there should be separate plans for orienting employees remotely and on-site to ensure consistency.

# Preparing for Orientation Day

Since organizations only have one shot to orient new hires, it's important to be prepared. HR professionals, hiring managers or other orientation facilitators should review the orientation process and make sure they have everything ready before an employee arrives or logs on for their first day.

Employers can follow these steps to ensure various aspects are in place for an effective orientation:

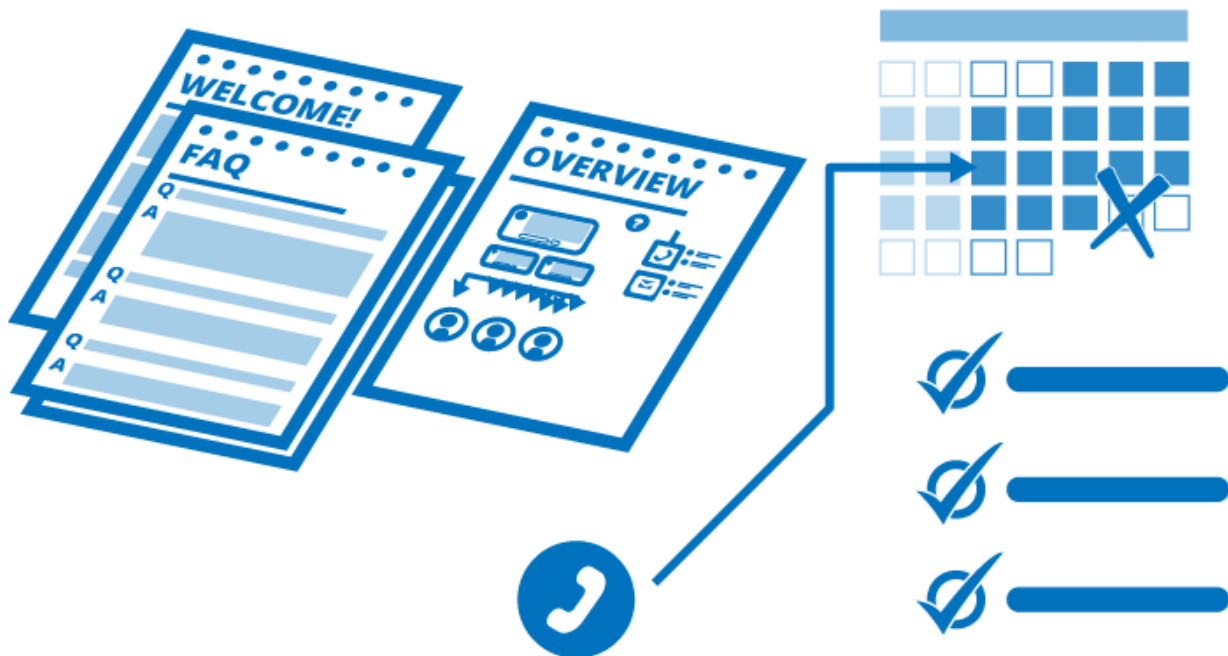
- Review the orientation process.** Begin by reviewing the current orientation process to identify any areas that may need improvement or updating. Evaluate the effectiveness of existing materials, presentations and activities to ensure they align with the organization's goals and objectives for onboarding new hires.
- Develop the schedule and timeline.** HR professionals should complete and share a formal schedule of events for the new hire's first day and potentially the first week. Try to incorporate a variety of interactive methods, such as presentations, group discussions and hands-on activities, to keep new hires engaged and communicate key information effectively. A checklist can help ensure all necessary steps are completed.
- Arrange welcome activities.** Plan engaging welcome activities to help new hires feel valued and welcomed into the organization. These could include icebreaker games, team-building exercises, and introductions to company culture and values designed to foster connections and create a positive first impression.
- Confirm logistics and resources.** Smooth execution of the onboarding process relies heavily on effective scheduling and logistical planning. Double-check all logistical arrangements and ensure necessary resources are readily available for the orientation day. This includes reserving meeting spaces, arranging for technology and audiovisual equipment, and assembling orientation materials such as handbooks, manuals and welcome kits. Keep in mind that orientation logistics will vary greatly depending on the new hire's working arrangement: on-site, remote or hybrid.
- Coordinate with key stakeholders.** Collaborate with key stakeholders, including department heads, team leaders and IT support, to ensure a coordinated approach to orientation day. Communicate roles and responsibilities clearly and address any potential logistical or operational challenges in advance to minimize disruptions during the orientation process.
- Communicate with new hires.** HR professionals or hiring managers should reach out to new hires ahead of time to provide essential information about the orientation day, such as the schedule, who they'll be meeting with, dress code, parking instructions and any additional instructions they may need to show up prepared on their first day. It's also important to communicate what new hires should bring on their first day to complete required paperwork, such as a list of acceptable identity and employment authorization documents to complete Form I-9 and banking information to set up direct deposit. Clear communication helps alleviate potential anxieties and ensures that new hires are fully informed and well equipped.



HR Toolkit:  
**New Hire Orientation**

- **Prepare orientation materials.** Ensure that all orientation materials are organized, up to date and easily accessible for both facilitators and new hires. Review orientation presentations and handouts to ensure accuracy and relevance to the onboarding process. Job-specific training may also be required, depending on the role for which the new hire is being onboarded. Materials also include employee handbooks, training manuals, online resources and any other resources that will help familiarize new hires with company policies, procedures and culture.
- **Train facilitators and presenters.** Provide training and guidance to orientation facilitators and presenters to ensure they are well prepared to deliver engaging and informative sessions. Brief them on the objectives, content and expectations for each segment of the orientation program and encourage them to incorporate interactive elements to enhance new hire engagement. Once a facilitator has done several orientations, they'll likely need less training, but it's important to let them know that support is always available.
- **Anticipate and address potential issues.** Plan to mitigate any potential issues or challenges that may arise during the orientation process, such as technical difficulties or scheduling conflicts. Have contingency plans in place to address these issues swiftly and minimize disruptions to the orientation experience.

By diligently preparing for orientation day and following these suggested steps, employers can ensure that new hires receive a warm welcome and a comprehensive introduction to the organization, setting the stage for a positive onboarding experience.



# Orientation Day

Once there's a plan in place and all arrangements have been made, employers can focus on executing the orientation program with new hires. It ultimately comes down to sticking to a specific agenda; nonetheless, the main objectives across organizations on orientation day are as follows:

- ◆ **Welcome the new hire.** Extend a warm welcome to new hires upon their arrival, making them feel valued and appreciated by the organization. This includes providing a friendly greeting, introducing them to their colleagues, and offering any necessary support to help them acclimate to their new surroundings.
  
- ◆ **Facilitate orientation sessions.** Lead engaging and informative orientation sessions that cover all relevant topics outlined in the overall onboarding program. Use a variety of interactive methods, such as presentations, group discussions and hands-on activities, to keep new hires engaged and ensure key information is effectively communicated.
  
- ◆ **Provide necessary resources and support.** Offer ongoing support and guidance to new hires throughout the orientation process. This includes providing access to resources, answering questions, addressing concerns, and offering assistance with any challenges or issues during the onboarding experience. Critical first-day resources include:
  - Email and account creation
  - ID card or badge issuance
  - IT equipment, phone and other device setup
  - HR paperwork completion
  - Employee handbook review
  - Employee benefits plan enrollment
  - Workspace and supplies (e.g., notepads and pens) setup, if applicable
  
- ◆ **Address questions and concerns.** Create a supportive environment where new hires feel comfortable asking questions and seeking assistance as needed. Be responsive to their inquiries, provide accurate information, and offer guidance to help alleviate any concerns or uncertainties they may have about their new role or the company.
  
- ◆ **Collect feedback for improvement.** Solicit feedback from new hires about their orientation experience to identify areas for improvement and refinement. This can be done through surveys, focus groups or one-on-one discussions to gather insights and suggestions for enhancing the onboarding process moving forward. Some employers even set up 30-, 60- and 90-day check-ins with all new hires to gather feedback and check how the employee is adapting to their role.

Orientation day will be set up differently across companies since the agenda, activities and priorities are specific to the organization, employee roles, industry and more.

## Sample Orientation Schedules

A comprehensive schedule answers when, where, who and what happens on Day 1 for a new hire. Here's a sample schedule for orientation with one new hire that's occurring in person at the organization:

On-site Orientation (Individual)			
Time	Location	Company Employee	Topic
9 a.m.	Front Desk	Receptionist	Orientation check-in
9:15 a.m.	Conference Room A	Manager	Welcome meeting (e.g., company history, mission and values, team goals and job responsibilities)
10 a.m.	Office	Manager	Office tour
10:30 a.m.	IT	IT	Email and equipment setup
Noon	Training Room B	Entire team	Catered lunch and meet-and-greet with teammates
1 p.m.	Training Room B	Entire team/Learning and development (L&D) employee	Collaborative work session
2 p.m.	HR	HR	Review policies, procedures, benefits and employee handbook; complete HR paperwork
3 p.m.	Workspace		You can use the rest of the day to get situated and set up your workspace

**New Hire Orientation**

Some organizations may have several new hires start on the same day and conduct most of the orientation in a group setting. Here's a sample schedule for a group orientation that's on-site at an organization:

On-site Orientation (Group)			
Time	Location	Company Employee	Topic
9 a.m.	Front Desk/ Training Room C	Receptionist	Orientation check-in and catered group breakfast for all new hires
9:30 a.m.	Training Room C	HR/L&D employee	Welcome meeting (e.g., company history, mission and values, team goals and job responsibilities)
10 a.m.	Training Room C	HR/L&D employee	Breakout sessions with activities for new hires to get to know each other
11 a.m.	Training Room C	HR/L&D employee	Breakout sessions to discuss and apply the company mission and values
Noon	Cafeteria		Catered lunch
1 p.m.	Training Room C	HR/L&D employee	Employee benefits and L&D presentation; complete HR paperwork
2 p.m.	Office	HR	Office tour
3 p.m.	Training Room C	Senior leadership team	Q&A session with company leadership
3:30 p.m.	IT	IT	Email and equipment; workspace assignment
4 p.m.	Conference Room A	New hire's team	Team introductions

**New Hire Orientation**

Conversely, if the new hire will be working remotely, orientation will look a bit different. A comprehensive agenda can be emailed before the new hire's first day, but sending and accepting calendar holds for orientation activities will also be critical. Therefore, on the first day, employees are able to reference their calendars and directly dial into meetings. Here's a sample schedule for a virtual orientation:

Remote Orientation (Individual)			
Time	Location	Company Employee	Topic
9 a.m.	Microsoft Teams	Manager	Welcome meeting (e.g., company history, mission and values, team goals and job responsibilities)
10 a.m.	Microsoft Teams	IT	Email, equipment and remote policies
11 a.m.	Microsoft Teams	Entire team	Weekly team standup meeting; meet-and-greet with teammates
Noon			Enjoy lunch on us! Check your email for a gift card.
1:30 p.m.	Microsoft Teams	HR	Review policies, procedures, benefits and employee handbook; complete HR paperwork
4 p.m.	Microsoft Teams	Manager	Check in; discuss any questions about the first day

Keep in mind that the orientation schedule or agenda should be tailored to each organization and its objectives or goals. These sample schedules are meant to be a starting point.

## Post-orientation Actions

Orientation is the first official step in the onboarding process, which commonly lasts three, six or even 12 months past the employee's first day. While orientation is critical for team introductions, company overview, paperwork completion and other routine tasks, onboarding builds upon that foundation and integrates the new hire into the organization. As such, HR representatives or managers can prioritize the following actions following new hire orientation:

- ◆ **Send follow-up communications.** Maintain open lines of communication with new hires following orientation to provide ongoing support and guidance as they continue to settle into their roles. Managers should check in regularly (or set up weekly or biweekly one-on-one meetings) to address any additional questions or concerns they may have and offer assistance as needed.
- ◆ **Offer ongoing support and mentorship.** If available, pair new hires with mentors or implement buddy systems to provide continued support and mentorship beyond the orientation period. A BambooHR study found that more than half (56%) of employees said having a buddy or mentor at work was very important when getting started at an organization. Encourage mentors to offer guidance, share insights, and help new hires navigate the challenges of their new roles and the organization.
- ◆ **Review performance expectations.** Regular performance reviews should be conducted to assess new hires' progress and provide constructive feedback for growth and development. Managers should set clear performance expectations, establish goals and provide the necessary support and resources to help new hires succeed in their roles. Some organizations may consider setting up informal three- and six-month performance reviews.
- ◆ **Integrate hires into company culture.** Encourage new hires to participate in team-building activities, social events and other company initiatives to foster a sense of belonging and integration within the organization. Such information may already be available in the new hire's welcome information, but it's a good idea to highlight opportunities that can positively impact the overall employee experience. The goal is to help new hires build relationships with their colleagues and become active contributors to the company culture.

Lastly, it's important for leaders to continually assess and evaluate the orientation's effectiveness. The next section explores how to continually evaluate and improve new hire orientation programs and related activities.

# Evaluating and Improving Orientation

New hire orientation shapes the employee experience and sets a foundation for the overall onboarding process and integration into an organization. Evaluating and continuously improving the new hire orientation process is essential to ensure it remains aligned with the company's evolving needs. It also effectively supports new hires in their integration, productivity and long-term engagement, ultimately contributing to higher retention rates and overall organizational success.

Here are key steps involved in evaluating the effectiveness of an orientation program:

- ◆ **Gather feedback from new hires.** To gain insights into the new hire experience and identify areas for improvement, it's essential to gather feedback directly from new hires. This can be done through various channels, such as surveys, focus groups, one-on-one interviews or anonymous feedback forms. Ask new hires about their overall satisfaction with the orientation process, the clarity of information provided, the relevance of training materials and any suggestions for improvement. Encourage honest and constructive feedback to ensure the evaluation process is comprehensive and actionable.
- ◆ **Check in with managers.** Since managers or supervisors interact daily with the new hire and their team, it would be helpful to know if orientation day was informational and successfully set up the employee to jump into their role and get involved at the organization.
- ◆ **Solicit feedback from departing employees.** It may also be insightful to ask employees about their onboarding experience during an exit interview, especially if they haven't been with the company for long. Employers may uncover issues or challenges that need to be addressed to revamp their orientation process.
- ◆ **Track key performance indicators (KPIs).** Employers should identify and track relevant KPIs to measure the effectiveness of their new hire orientation program and identify areas for improvement. Common KPIs include:
  - **New hire retention rates** suggest how successful the organization is at retaining employees within their first few months or years of employment and may shed light on whether an orientation program is effective or troublesome.
  - **Time-to-productivity** tracks how quickly new hires become fully productive in their roles, potentially revealing inefficiencies in orientation or related training.
  - **Employee engagement scores** reveal employees' emotional commitment and connection to their work and the organization.
  - **Feedback from managers and supervisors** provides insights into new hire performance, satisfaction and development needs.
  - **Time-to-completion of onboarding tasks** measures the efficiency and effectiveness of the orientation and onboarding processes. A shorter duration suggests that the processes are streamlined and clear to new hires, while a longer completion may expose inefficiencies, confusion or gaps to be addressed.

## **New Hire Orientation**

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- **Learning and development metrics** (e.g., new hires' participation in ongoing training and development opportunities) can indicate the program's effectiveness in fostering continuous learning and growth.
  - **Quality-of-hire metrics** (e.g., new hires' performance, productivity and contributions to the organization over time) assess the performance and suitability of new hires over time.
- 
- ◆ **Assess overall effectiveness.** Evaluate the overall effectiveness of the orientation program based on key performance indicators and outcomes. Analyze the data collected during the evaluation process to identify strengths, weaknesses, trends, and areas for improvement in the orientation program. Use this information to inform decision-making and enhance the effectiveness of future onboarding efforts.
  - ◆ **Implement changes for enhancement.** Based on the findings of the evaluation process, changes and enhancements should be implemented to improve the orientation program. This may involve adjusting the orientation schedule, enhancing communication strategies or revising presentations, handouts, training modules or online resources to address any gaps or deficiencies identified during the evaluation process. Collaboration among key stakeholders—HR professionals, department heads and new hires—is crucial to ensure that changes are implemented effectively and aligned with organizational goals and priorities.
  - ◆ **Update orientation materials regularly.** It's also important for employers to regularly review and update orientation materials to ensure that orientation materials remain current, accurate and relevant to the needs of new hires and the organization's onboarding objectives.

By systematically evaluating the effectiveness of the orientation program and implementing changes for enhancement, employers can continuously improve the onboarding experience for new hires and optimize outcomes for the organization. This proactive approach demonstrates a commitment to employee development and ensures that the orientation process remains relevant, engaging and impactful in supporting new hires' success and integration into the organization.



# Legal Considerations for Orientations

Ensuring compliance with relevant legal requirements is essential when designing and conducting new hire orientation programs. By addressing key legal considerations, employers can mitigate risks and create a welcoming and legally compliant onboarding experience for new hires.

This section outlines some critical legal considerations to keep in mind regarding orientations:

## State and Federal Forms

Many employment-related forms need to be completed when hiring new employees. The following state and federal new employee forms are mandatory and should be completed as soon as a new hire starts:

- ◆ Employment Eligibility Verification form (Form I-9)
- ◆ Form W-4 (employee’s withholding certificate)
- ◆ State tax withholding forms

To ensure compliance, employers should consult local legal counsel to learn about federal and state requirements for reporting new hires and discuss any other concerns or questions.

## New Hire Paperwork

There is a myriad of new-hire paperwork that will need to be completed on or before the employee’s first day. The timing of when this paperwork is completed can vary by employer or be dictated by law, but generally, new-hire paperwork may include the following:

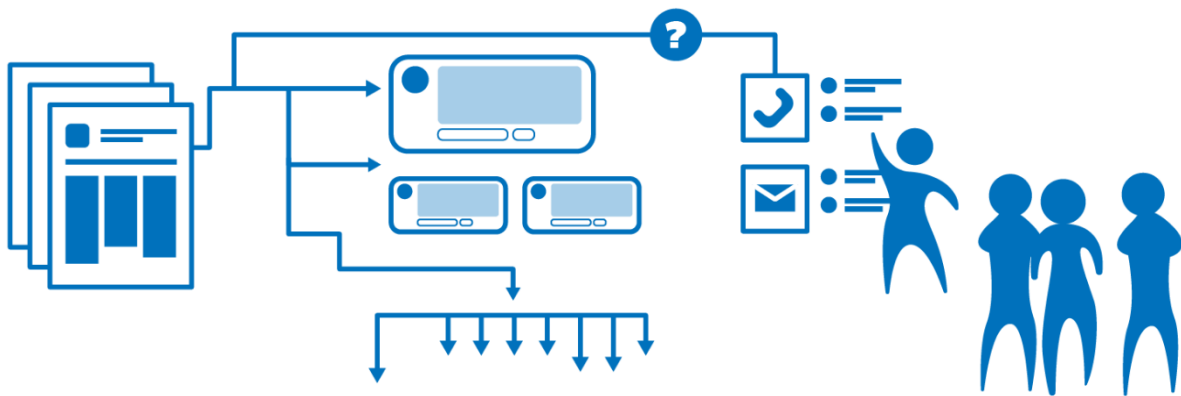
Employment Eligibility Verification form (Form I-9)	Emergency contact information	Employee agreements (e.g., offer letter, background check, acknowledgment and consent form for drug and alcohol testing, nondisclosure agreement, remote or hybrid work agreement and employee handbook or policy acknowledgment)
Tax forms (e.g., Form W-4)	Employee handbook and workplace policies	
Direct deposit form	Employee benefits information	

There’s a lot of paperwork to be filled out when hiring a new employee. While some forms are important or necessary, some are mandatory. Some paperwork can be initiated before a new employee starts, but it’s important to make completing new hire paperwork and forms a first-day activity. This helps ensure that mandatory federal and state forms are correct and completed in a timely manner. A streamlined process or checklist can help HR representatives gather the necessary information and signatures the organization needs to employ the worker.

# Conclusion

New hire orientation plays a pivotal role in shaping the employee experience and laying the foundation for long-term success within the company by providing essential information, fostering a sense of belonging, and equipping new hires with the knowledge and resources they need to thrive in their roles. While part of the overall onboarding experience, orientation is a one-time event that employers don't get a second chance to redo.

A comprehensive approach to new hire orientation ensures that employers effectively prepare, support and integrate new hires into their organizations, setting them up for long-term success and satisfaction in their roles. Orientation should be collaborative and continuously assessed and optimized to ensure it resonates with new hires and successfully integrates them into their teams and the organization. A myriad of paperwork, including mandatory federal and state forms, must be completed when a new employee starts, and orientation day is the perfect time to get those squared away. A streamlined orientation program can help ensure organizations don't miss anything on a new hire's first day on the job and streamline the process so all employees receive the same experience when joining the company.



This HR Toolkit is only a guide to new hire orientation. Contact Risty Benefits for additional information and resources on integrating new hires into their roles, the workplace and the overall company culture.

# Appendix

Orientation is the foundational step in acquainting new hires with essential information pertinent to their role and workplace, laying the groundwork for successful integration into the company culture and environment. The format of orientation varies greatly by organization, so this toolkit is designed to be a guide.

This appendix offers valuable resources, including checklists and forms, that you can print or email and use for your organization. Please review these resources when implementing or accessing your organization's new hire orientation program. The information included in this section may require some customization, and it should only be used as a framework. Also, due to the legal requirements regarding new hire documents and forms, organizations are encouraged to seek legal counsel to discuss and address specific issues and concerns.

Furthermore, the resources included in this appendix are just a small sampling of the materials that are available to employers. By contacting Risty Benefits, employers may have access to an entire library of compliance-related materials. Reach out if you have any questions about these materials or any other content in this toolkit.

## Printing Help

There are many printable resources in this appendix. Please follow the instructions below if you need help printing individual pages.

1. Choose the "Print" option from the "File" menu.
2. Under the "Settings" option, click on the arrow next to "Print All Pages" to access the drop-down menu. Select "Custom Print" and enter the page number range you would like to print, or enter the page number range you would like to print in the "Pages" box.
3. Click "Print." For more information, please visit the Microsoft Word [printing support page](#).

# CHECKLIST | EMPLOYEE ORIENTATION PROGRAM

Presented by Risty Benefits

Effective new hire orientation plays a pivotal role in integrating employees into the company culture, setting expectations and providing essential information for a successful start. It sets the tone for the employee’s experience and influences their productivity and long-term commitment to the organization.

Employee orientation serves as the initial welcome of new hires to a company, marking the beginning of their employment journey. Orientation provides a general overview of company policies, procedures and culture. It is one of the first steps in the larger onboarding process, which encompasses a series of events and training sessions. The broader onboarding process facilitates new hires’ transition into their roles, helps them evolve into successful and productive employees, and acclimates them to the organization. These processes are critical to setting up a new hire for success—and often tenure—at the organization. Keep in mind that orientation logistics will vary greatly depending on the new hire’s working arrangement: on-site, remote or hybrid.

This checklist can be referenced by managers, supervisors, HR professionals or any other personnel facilitating the orientation process for new hires. It outlines steps for planning, developing, implementing and measuring an employee orientation program.

Designing an Employee Orientation Program	Completed
Define the goals and objectives of the orientation program.	<input type="checkbox"/>
Understand new hires’ demographics, backgrounds and needs to tailor orientation accordingly.	<input type="checkbox"/>
Determine the budget, personnel and resources needed for the orientation program.	<input type="checkbox"/>
Gather input from current employees and stakeholders to identify gaps or areas for improvement in the existing orientation program.	<input type="checkbox"/>
Set clear timelines for planning, developing, implementing and evaluating stages of the program.	<input type="checkbox"/>
Decide which topics will be covered during the orientation, including: <ul style="list-style-type: none"> <li>• Company culture</li> <li>• Policies, procedures and expectations</li> <li>• Employee benefits</li> <li>• Job-specific information</li> <li>• Employment paperwork (e.g., Employment Verification form (Form I-9), Form W-4, state tax withholding forms)</li> </ul>	<input type="checkbox"/>

## CHECKLIST | EMPLOYEE ORIENTATION PROGRAM

Choose the appropriate delivery methods for aspects of orientation, such as presentations, workshops, videos or online modules. Keep in mind that consideration should be made regarding the location of orientation. For example, if the employee will be working remotely, all aspects of the plan should be able to be conducted virtually and asynchronously. In-person orientation will require workspaces, conference rooms and other workplace locations. In a hybrid workplace, there should be separate plans for orienting employees remotely and on-site to ensure consistency.	<input type="checkbox"/>
Delegate tasks to relevant team members or departments planning and executing the orientation program.	<input type="checkbox"/>
Develop orientation materials, including handbooks, manuals, presentations and digital resources.	<input type="checkbox"/>
Plan engaging and interactive activities (e.g., role-playing exercises, icebreaker games and team-building exercises) and group discussions to engage new hires and facilitate learning.	<input type="checkbox"/>
Tailor the orientation content to align with the specific needs and roles of different employee groups within the organization.	<input type="checkbox"/>
Ensure the orientation program facilitates the organization's compliance with legal requirements, including completing federal and state employment documents and other new hire paperwork.	<input type="checkbox"/>

Preparing for Orientation Day	Completed
Complete and share a formal schedule of events for the new hire's first day and potentially the first week.	<input type="checkbox"/>
Collaborate with key stakeholders, including department heads, team leaders and IT support, to ensure a coordinated approach to orientation day.	<input type="checkbox"/>
Prepare orientation materials, ensuring they are organized, up-to-date and easily accessible for both facilitators and new hires.	<input type="checkbox"/>
Train presenters and facilitators to ensure they know the content and can effectively deliver it to new hires.	<input type="checkbox"/>
Confirm logistical arrangements and ensure necessary resources are readily available for orientation day. This includes reserving meeting spaces, arranging for technology and audiovisual equipment, and preparing orientation materials such as handbooks, manuals and welcome kits.	<input type="checkbox"/>
Communicate with new hires ahead of time to provide essential orientation day information, such as the schedule, who they'll be meeting with, dress code, parking instructions and any additional instructions they may need to show up prepared on their first day.	<input type="checkbox"/>
Anticipate any potential issues or challenges that may arise during the orientation process, such as technical difficulties or scheduling conflicts. Have contingency plans to address these issues swiftly and minimize disruptions to the orientation experience.	<input type="checkbox"/>

Orientation Day	Completed
<p>Welcome the new hires upon arrival, making them feel valued and appreciated by the organization. This includes greeting them, introducing them to their colleagues and offering any necessary support to help them acclimate to their new surroundings.</p>	<input type="checkbox"/>
<p>Lead engaging and informative orientation sessions covering all relevant topics outlined in the orientation program.</p>	<input type="checkbox"/>
<p>Offer ongoing support and guidance to new hires throughout the orientation process. This includes providing access to resources, answering questions, addressing concerns and assisting with any challenges or issues during the broader onboarding experience. Critical first-day resources include:</p> <ul style="list-style-type: none"> <li>• Email and account creation</li> <li>• ID card or badge issuance</li> <li>• IT equipment, phone and other device setup</li> <li>• New hire paperwork completion (e.g., Form I-9, Form W-4, state tax withholding forms, direct deposit form, emergency contact form)</li> <li>• Employee handbook review</li> <li>• Employee benefits plan enrollment</li> <li>• Workspace and supplies (e.g., notepads and pens) setup, if applicable</li> </ul>	<input type="checkbox"/>
<p>Address new hires' questions and concerns. Be responsive to their inquiries, provide accurate information and offer guidance to help alleviate any concerns or uncertainties they may have about their new role or the company.</p>	<input type="checkbox"/>
<p>Solicit feedback from new hires about their orientation experience to identify areas for future improvement and refinement. This can be done through surveys, focus groups or one-on-one discussions.</p>	<input type="checkbox"/>

Post-orientation Activities	Completed
<p>Maintain open lines of communication with new hires following orientation to provide ongoing support and guidance as they settle into their roles. For example, managers should check in regularly (or set up weekly or biweekly one-on-one meetings) to address any additional questions or concerns new hires may have and offer assistance as needed.</p>	<input type="checkbox"/>
<p>Offer ongoing support and mentorship. If available, pair new hires with mentors or buddy systems to provide continued support and mentorship beyond the orientation period.</p>	<input type="checkbox"/>
<p>Conduct regular performance reviews to assess new hires' progress and provide constructive feedback for growth and development. This can include setting clear performance expectations, establishing goals and providing the necessary support and resources to help new hires succeed.</p>	<input type="checkbox"/>
<p>Encourage new hires to participate in team-building activities, social events and other company initiatives to foster a sense of belonging and integration within the organization.</p>	<input type="checkbox"/>

Evaluating and Improving an Employee Orientation Program	Completed
<p>Gather feedback directly from new hires about their overall satisfaction with the orientation process, the clarity of information provided, the relevance of training materials and any suggestions for improvement. This can be done through various channels, such as surveys, focus groups, one-on-one interviews or anonymous feedback forms.</p>	<input type="checkbox"/>
<p>Check in with managers and supervisors to find out if orientation day was informational and set up the new hire to jump into their role and get involved in the organization successfully.</p>	<input type="checkbox"/>
<p>Solicit feedback from departing employees about their onboarding experience during an exit interview, especially if they haven't been with the company for a long time.</p>	<input type="checkbox"/>
<p>Track key performance indicators (KPIs) to measure the program's effectiveness and identify areas for improvement. Common KPIs include:</p> <ul style="list-style-type: none"> <li>• New hire retention rates</li> <li>• Time-to-productivity tracks</li> <li>• Employee engagement scores</li> <li>• Feedback from managers and supervisors</li> <li>• Time-to-completion of onboarding tasks</li> <li>• Learning and development metrics (e.g., new hires' participation in ongoing training and development opportunities)</li> <li>• Quality of hire metrics (e.g., new hires' performance, productivity and contributions to the organization over time)</li> </ul>	<input type="checkbox"/>
<p>Implement changes and enhancements to improve the orientation program. This may involve adjusting the orientation schedule, enhancing communication strategies, or revising presentations, handouts, training modules, or online resources to address any gaps or deficiencies identified during the evaluation process.</p>	<input type="checkbox"/>
<p>Update orientation materials regularly to ensure content remains current, accurate and relevant to the needs of new hires and the organizations' orientation objectives.</p>	<input type="checkbox"/>

Contact us today for more information about orientation and onboarding strategies.

# Risty Benefits Inc.

## New Hire Orientation Survey

Welcome to Risty Benefits Inc.! We're happy to have you on board and eager to hear about your experience with our orientation process. Your feedback is invaluable in helping us improve and ensure that every new employee has a smooth and productive start.

Please take a few moments to complete this survey. Your responses will remain confidential.

Once complete, please return the survey to Liz Lambertz.

Thank you for your feedback!

1. Please mark the answer that best describes your overall feeling about the following statements relevant to the orientation process.

	<b>Strongly Agree</b>	<b>Agree</b>	<b>Neutral</b>	<b>Disagree</b>	<b>Strongly Disagree</b>
The orientation schedule was well-organized.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Orientation provided a clear overview of the company's mission, values and culture.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The information provided during orientation was relevant to my role.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The information provided during orientation helped set me up for success in my role.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Orientation helped me understand the company's expectations of me as a new employee.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Orientation adequately covered HR policies, employee benefits and procedures.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I received adequate IT equipment and support during orientation to be able to work.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I felt welcomed by my team during orientation.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I felt welcomed by the company and leadership during orientation.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
All of my questions or concerns were addressed during orientation.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. Did the orientation process meet your expectations?



Yes

No

3. Do you feel prepared for your role?

Yes

No

4. What aspects of the orientation process did you like the most, and why?

5. Were there any topics or areas that you felt were not adequately covered during orientation? If yes,

please specify.

6. How could we enhance the orientation experience for future new hires?

7. How would you describe your first day?

•

8. What were your top three reasons for joining the company? Do you think those reasons have been met?

•

9. Overall, how would you rate the orientation process?

- Excellent
- Above average
- Average
- Below average
- Poor

10. Would you recommend Risty Benefits Inc. to others in your network?

- Yes
- No

11. Would you recommend any changes to the orientation process for future new hires? If yes, please elaborate.

12. Please provide any additional comments or suggestions here regarding your orientation experience.

•

Thank you for your feedback!

# Checklist for New Employees

Employee Name: \_\_\_\_\_ Title: \_\_\_\_\_

- Status:**
- |                                    |                                     |
|------------------------------------|-------------------------------------|
| <input type="checkbox"/> Exempt    | <input type="checkbox"/> Non-Exempt |
| <input type="checkbox"/> Full-Time | <input type="checkbox"/> Part-Time  |
| <input type="checkbox"/> Temporary | <input type="checkbox"/> Seasonal   |

## Federal and State Forms

- Form W-4
- State Withholding Allowance Form
- Form I-9

## Job-Specific Information

- Introduction to the job
- General performance expectations (e.g., productivity)
- Written job description
- Procedures manuals (if applicable to job)
- Work rules

## Introduction to Work Area

- Workstation, cubicle, office location
- Supervisor, manager, key co-workers and support personnel and their locations
- Lockers or other areas for personal items
- Cafeteria, vending machines, nearby food service
- Copier, fax, printer, other shared office equipment
- Storage closet, cleaning supplies, tools and equipment (if applicable)
- Supplies, mail, message board, sign-in and sign-out,
- Emergency exits, fire stairs, post-exit meeting area
- Parking, including restrictions
- Building hours, work schedule, lunch and breaks

## Employee Identification

- Security cards, office and building keys
- Credit and gas cards
- Cell phone

## Phone & Communication System

- Phone number, access code for messages, Introduction to phone system, message recording & retrieval, making calls

## New Hire Checklist

- Phone policies

### **Computer System**

- Log-in, password, procedures for logging in and out, remote access
- Introduction to Outlook, messaging, calendar, address book
- Contact for computer related questions

### **Compensation & Reimbursement**

- Time sheets/payroll procedures
- Leave requests - procedure
- Mileage & other expense reimbursements
- Employee handbook and any documents explaining employee benefits; forms for health insurance, 401(k) enrollment, life insurance, etc.

## Orientation Checklist

This form should be completed by Human Resources.

Employee Name

Start Date

--	--

Job Title

ID Number

--	--

Name of Immediate Supervisor

Department

--	--

**Employment Status**—Check all that apply

- Full-time  
  Part-time  
  Intern  
  Temporary employee  
  Exempt  
  Non-exempt

**Completion of Forms**—Check when finished

- |   |  |   |
|---|--|---|
| <input type="checkbox"/> Application(s)               | <input type="checkbox"/> Signed offer letter       | <input type="checkbox"/> Non-compete agreement          |
| <input type="checkbox"/> Confidentiality agreement    | <input type="checkbox"/> I-9 Form                  | <input type="checkbox"/> Voluntary self-identification  |
| <input type="checkbox"/> Scheduling policy            | <input type="checkbox"/> Cell phone and PDA policy | <input type="checkbox"/> Internet/computer usage policy |
| <input type="checkbox"/> Receipt of Employee Handbook |  |   |

**Voluntary Benefits**—Check when employee is enrolled in each of the following

- |   |   |
|---|---|
| <input type="checkbox"/> Health Insurance: [insert date enrolled]                 | <input type="checkbox"/> HSA: [insert date enrolled]            |
| <input type="checkbox"/> Dental Insurance: [insert date enrolled]                 | <input type="checkbox"/> Life Insurance: [insert date enrolled] |
| <input type="checkbox"/> Accidental Death & Dismemberment: [insert date enrolled] | <input type="checkbox"/> FSA: [insert date enrolled]            |
| <input type="checkbox"/> Vision Insurance/Discount: [insert date enrolled]        | <input type="checkbox"/> 401(k): [insert date enrolled]         |
| <input type="checkbox"/> Long-term Care   | <input type="checkbox"/> Short-term Disability                  |
| <input type="checkbox"/> Long-term Disability                                     | <input type="checkbox"/> Automatic/Direct Deposit               |

**Forms Returned**—Check when employee returns each of the following forms

W-4

State withholding

Copy of offer letter/exemption status

Direct deposit authorization

**Other**

State and federal posters (remote employees only)

Take employee's photo

Employee referral information

Name plate/tag

Security badge/FOB

Order business cards

Provide employee with orientation schedule

New employee announcement to staff

Provide employee with position description

Review test results (if applicable)

Signature (Human Resources)

Date

--	--

# Notice of New Hire Orientation

Dear \_\_\_\_\_ :

I am pleased that you have decided to join \_\_\_\_\_ in the position of \_\_\_\_\_. Please find enclosed a copy of the orientation schedule for your first \_\_\_\_\_ of employment.

The orientation program is designed to help you learn more about \_\_\_\_\_, your position, the department, and our current projects as quickly as possible.

I look forward to working with you. I hope you will find working at \_\_\_\_\_ productive and enjoyable. Should you have any questions, don't hesitate to contact me.

Sincerely,

---

Signature

### **Orientation Period Policy**

For all employees hired by Risty Benefits Inc., the first 90 days of employment are considered an orientation period. During this time, the employee will undergo training and orientation as directed by the employee's supervisor. The employee's supervisor will also monitor the employee's performance during this time.

During the first 90 days of employment, the employee is encouraged and expected to ask questions concerning his or her job responsibilities, and to determine if he or she is satisfied with the position. If the employee's job performance is found to be unsatisfactory by his or her supervisor at any time during the first 90 days of employment, the employment will be terminated.

All new employees will receive a confidential performance evaluation from their supervisor at the end of the orientation period.

**Risty Benefits Inc.**

Printed

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## Orientation Period Performance Review

Employee: \_\_\_\_\_ Department: \_\_\_\_\_

Job title: \_\_\_\_\_ Supervisor: \_\_\_\_\_

Reviewer: \_\_\_\_\_

Date of hire: \_\_\_\_\_ Date of review: \_\_\_\_\_

90 Day Review  180 Day Review  Other: \_\_\_\_\_

### Performance Ratings

**Excellent** – far exceeds job requirements.

**Very good** – usually exceeds job requirements.

**Satisfactory** – meets all job requirements.

**Fair** – meets minimum job requirements.

**Unsatisfactory** – falls well below requirements of the job.

### PERFORMANCE AREAS

1. **PERFORMANCE RESULTS:** Completes work on time and without sacrificing performance goals or standards.

Excellent  Very Good  Satisfactory  Fair  Unsatisfactory

2. **COOPERATION/TEAMWORK:** Able to work on a team and willingly accepts assignments.

Excellent  Very Good  Satisfactory  Fair  Unsatisfactory

3. **INITIATIVE:** Self-starter who puts forth the time and energy to perform tasks without being told.

Excellent  Very Good  Satisfactory  Fair  Unsatisfactory

4. **ORGANIZING AND PLANNING:** Effectively uses time and resources to accomplish work within appropriate deadlines.

Excellent  Very Good  Satisfactory  Fair  Unsatisfactory

5. **COMMUNICATION:** Both verbal and written communications are clear, concise, and accurate.

Excellent  Very Good  Satisfactory  Fair  Unsatisfactory

6. **INTERPERSONAL SKILLS:** Works well with others in both informal and formal situations.

Excellent  Very Good  Satisfactory  Fair  Unsatisfactory

**FOR SUPERVISORS, MANAGERS, AND/OR SALES-RELATED POSITIONS  
THAT INCLUDE THE FOLLOWING:**

7. **SUPERVISION AND LEADERSHIP:** Effectively directs staff, provides ongoing feedback, and acts as a positive model for others.

Excellent    Very Good    Satisfactory    Fair    Unsatisfactory

8. **SALES/MARKETING:** Obtains new work (e.g., listings, corporate accounts, etc.) from both existing clients and new clients.

Excellent    Very Good    Satisfactory    Fair    Unsatisfactory

9. **OTHER:** (Define and rate another significant performance factor if necessary.)

Excellent    Very Good    Satisfactory    Fair    Unsatisfactory

**EXPECTED IMPROVEMENTS/ACCOMPLISHMENTS:**

**PERFORMANCE AREAS THAT NEED FURTHER DEVELOPMENT:**

## General Practices

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**OVERALL EVALUATION** (check one):

Excellent    Very Good    Satisfactory    Fair    Unsatisfactory

**DATE OF NEXT REVIEW:**

**ADDITIONAL SUPERVISOR OR EMPLOYEE COMMENTS:**

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Employee's Signature

---

Date

---

Immediate Supervisor's Signature

---

Date

---

Reviewer's Signature

---

Date

(Employee signature indicates that this evaluation has been discussed with you. It does not necessarily signify agreement).