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How to use the Toolkit

Each of the Tools is written in a similar format, which is outlined below. The Toolkit is supported by access to electronic copies of all documentation, checklists and templates. All of the Tools are available online as editable documents enabling trainers, coaches, facilitators, HR managers and, where applicable, line managers to insert their company logo or brand colours into the template with ease.

The Tools can be used in a group training session and/or a one-to-one coaching session. There is guidance on approach but it is assumed that the reader has some knowledge of training and how to design workshops or coaching sessions.

Material that is for the trainer/facilitator only is denoted at the top of each page by the icon .

Material that may be disseminated in printout or photocopy form for the use of participants is denoted at the top of each page by the icon . These documents may be downloaded from the Toolkit's website [www.cipd.co.uk/tsm] and are customisable at the discretion of the purchaser of the Toolkit or the purchaser's consultant/facilitator.

Customisation is entirely up to the purchaser and/or the consultant/facilitator, according to the needs either of the organisation or of individual sets of participants. That is, for the organisation or its employee branding, a facilitator might for instance add the company logo and change the formatting to something resembling a house style. For the participants (or because of specialist knowledge or other distinction on the part of the facilitator), text and/or images may be added or deleted as regarded appropriate.

Terms of use for Toolkit Tools

If you work in an organisation you can use them with your employees as a facilitator. The Tools can be customised to suit your organisation. For instance you can add your own logo, insert or delete whole chunks of text or images, and change the formatting to suit your company branding. If you wish to place the electronic files on a company intranet or use them across multiple sites/offices, please email publishing@cipd.co.uk to apply for a multi-user licence.



If you are a consultant you can adapt the Tools to the needs of your client for a specific project. Your client and their employees have the right to keep and reuse the Tools for the lifetime of this project.

Facilitator's notes

Each tool starts with *Facilitator's notes*. This is brief but includes essential information to make the Tool easy to use in any workshop setting.

Handouts and worksheets

Finally, there are a number of handouts and worksheets. Participants can write, draw, or otherwise fill in whatever they are asked to by the facilitator – usually following some preliminary instruction or perhaps to analyse a scenario following discussion. Some also contain further advice and suggestions for obtaining additional information.



Introduction

Why we need this Toolkit

Effective induction is a critical HR process for organisations and it is crucial that they get it right as part of their short-term and long-term success. There are both direct and indirect costs associated with having to fill vacancies, so it is essential that this is minimised as far as is practicable. For example, CIPD research suggests that the average recruitment cost of filling a vacancy is £4,667, increasing to £5,800 when calculating associated labour turnover costs.

Induction can also play a positive role in improving employee retention across organisations and 45% of respondents to the CIPD *Recruitment, Retention and Turnover* survey report (CIPD 2008) (in comparison with 36% in the 2007 survey) have improved their induction process specifically to address these retention issues.

Additional benefits of having an effective induction programme include:

- reducing the anxieties of new employees who are worried about joining a new organisation
- increasing new employees' commitment to the organisation
- unsatisfactory training may reduce levels of job satisfaction (leading to poorer performance and withdrawal behaviours such as increased levels of sickness absence)
- time savings for managers who won't have to go through lots of information with employees individually when they start work
- less likelihood of accidents if employees have received comprehensive training and support on health and safety matters
- easier transition into the work environment and working with new colleagues and managers.

Where possible, induction training should be customised to the organisation so that it is very specific; however, it can prove time-consuming to identify the areas that you would want to cover and then create appropriate resources and design relevant activities. And not all organisations will have the expertise to be able to design a programme from scratch. Therefore this CIPD Toolkit allows you to benefit from a professionally designed programme.



This Toolkit provides the framework for your entire training programme alongside appropriate activities, thereby allowing you to add your own organisational details to create a customised, high-quality induction programme at a low cost. Once your organisational details have been incorporated, they can be used for all future deliveries of induction training (with the exception of the role-specific information, which will need to be provided individually for all new employees).

By buying this Toolkit you are getting the best of both worlds: a customisable training programme based on best practice at a very reasonable price.

Making the case for effective induction training

Effective employee induction training can be very beneficial to organisations in helping new employees fit in as soon as possible. This may mean that they can be more productive at an earlier stage and will have a sound understanding of the way that the business, their department and their team operates. Hopefully it will also encourage them to feel part of the organisation and encourage them to be committed to it.

Some organisations may have data that shows the number of employees who leave an organisation within their first year of service, and this is one of the areas that can potentially be reduced by delivering an effective induction programme. If you need to persuade some of the key stakeholders that they should invest time in resources and training, here are some suggestions on how to make the business case:

- 1 Highlight some of the key findings from the CIPD surveys.** The essential role of induction is reflected in the CIPD's 2008 *Recruitment, Retention and Turnover* survey report, which suggests that 22% of new starters leave within the first six months. This may be because the employee has not settled into the organisation and may not have received appropriate training and support. There are both direct and indirect costs associated with having to fill vacancies, so it is essential that this is minimised as far as is practicable.
- 2 Explain the potential impact on productivity and performance.** More knowledgeable employees are likely to fit into the organisation more smoothly and perform to a high standard. Ineffective (or lack of) induction can lead to mistakes being made or employees not being sufficiently informed to perform to the best of their abilities.



- 3 Set the context of this training programme.** This Toolkit has been designed to incorporate best practice in induction training alongside resources that are tailored for your organisation. This allows you to have a high-quality programme at a low cost. The design of the programme and its accompanying resources mean that it is not overly time-intensive and can be delivered easily.
- 4 Reinforce the importance of evaluation within the induction programme process.** This Toolkit contains a number of Tools that can be used to evaluate the effectiveness of the programme. This means that the strengths and weaknesses can be identified and used to inform future delivery.
- 5 Identify the links with corporate and HR strategies.** Increasing numbers of organisations are recognising that their people are at the centre of their organisation and make a vital contribution towards their strategic objectives. It is therefore useful for all new employees to be made aware of these strategies as soon as they join the company. This induction programme focuses on these wider issues as well as the more job-specific elements.
- 6 Highlight the clear links with accreditations such as Investors in People.** Working towards best practice and demonstrating a commitment to the present and future training and development of new employees will reflect positively on the organisation's reputation as a good employer.

Overview of skills and activities

The activities in this Toolkit will enable the participants to gain a sound understanding of their new employer; this includes knowledge of what the company does and its key objectives and business strategies. They will also find out about some of the organisation's key employment policies, which may prevent misunderstandings happening at a later date, as they will have the opportunity to ask any pertinent questions. New employees will also be able to find out about their department and team, as well as find out more role-specific information. The focus on future development and training should also demonstrate to the new employees that the organisation is keen to support and retain them.

Section 1: Pre-joining information features resources that could be used as a pre-induction as a means of engaging with new recruits as soon as possible and integrating them into the culture of the organisation. This means that when they arrive at the organisation to begin their induction as new employees, they will already have some background knowledge.



Section 2: Welcome to the organisation provides an introduction to the organisation and will familiarise the new recruits with what the organisation does, any future plans, and so on; there is also a focus at this early stage on the support that the organisation can offer to its new employees. In addition, this section covers some of the practical and ‘housekeeping’ issues that are important to new employees.

Section 3: Statutory information outlines information on the key areas that need to be covered by employment legislation and best practice and will include: health and safety; data protection; equality and diversity; environmental management; and sickness absence procedures.

Section 4: Introduction to the organisation’s policies, practices and processes introduces the three ‘P’s so that the employee can gain an awareness of the key policies, practices and processes. This includes information on terms and conditions of service as well as the organisation’s training and development and performance management schemes.

Section 5: Job-specific information focuses on issues that are more specific to the job roles of the new recruits so that they can gain an insight into their work environment and actual job role.

Section 6: Evaluating the induction process and moving forward centres on the evaluation of the induction programme. However, the purpose of this section is not just to evaluate the new employees’ views on the training they have participated in; it will also allow them to reflect on their new journey in the organisation and what they are looking to achieve.

Section 7: Supporting atypical workers provides additional resources for the trainer that they can use with different group of new employees, including new graduates, workplace returners and international employees.

Section 8: Enhancement resources for trainers features additional resources that can be used after the delivery of the initial induction programme. Use of these resources is likely to be dependent upon the organisational context and resources for training delivery.



Organising your training session(s)

As a trainer you can decide whether all of the activities are appropriate for the environment in which you are delivering the training. Clear guidance is given at the start of each activity so that you are clear which resources you will need and suggested timings for the activities. The activities have been designed so that they can be used with groups of different sizes (or even with individual employees) to reflect the different needs of organisations.

Depending on the size of the organisation and the available resources, this Toolkit can be delivered in different formats. The trainer should decide whether the Tools are provided in bite-size chunks (using individual or groups of tools) over an extended period of time or whether they should be provided together as a comprehensive programme as soon as a new employee joins the organisation. Handout 6 provides an overview of how the full programme could be delivered over one working week. If individual employees are going to be inducted, the programme can be tailored to address their specific needs by reviewing the contents list for this Toolkit and identifying the most pertinent issues.

You will notice that within some of the Tools it is recommended that you consider asking other stakeholders from the organisation to attend part of the session if they are available. This is an important part of the socialisation process and also encourages new staff to engage with their new colleagues. Where it is not possible for additional stakeholders to attend or deliver parts of the session, it is recommended that where possible the new employees are still personally introduced to their colleagues at an early stage. This could take place within either a formal or informal environment.

One of the key design features for this Toolkit is the ability to customise the resources so that they are in line with your organisation's policies and procedures. In advance of using the Toolkit for the first time you will benefit from spending some time going through each section to customise the resources where appropriate. To facilitate this each Tool has a section that contains 'set-up instructions for trainer', which clearly outlines the issues that you may wish to consider and highlights the documents that can be revised. While initially this may take some time to contextualise for your organisation, once it has been set up you will have an excellent organisation-specific tool that can be replicated for future cohorts of new employees.



Tool I.1

The importance of induction and pre-induction

Facilitator's notes

Introduction

Providing information to new employees in advance of their first day may make them feel more confident about joining the organisation. Many new employees will also appreciate a clear understanding of what they will encounter within their first few days in the organisation and will gain a positive view of the organisation and how it is managed.

Aim of the Tool

For new employees to understand the importance of induction and pre-induction in their new organisation.

Materials needed

- Handout I, 'Welcome to the organisation and an overview of the induction process'

Set-up instructions for trainer

- Review the content of Handout I and make any organisation-specific changes. You should also make sure that you insert the relevant names (of the new employee and the person sending the letter) into the document.
- As soon as a new employee has been appointed, arrange for them to receive a copy of Handout I, which outlines the pre-induction process and why it is beneficial.
- You may wish to consider whether there are any organisational documents, such as annual reports or internal newsletters, that may be of interest to the new employee. If this is appropriate, they can be sent with Handout I.

Procedure

- Send the new employee a copy of Handout I as soon as you have their details.



Handout 1

Welcome to the organisation and an overview of the induction process

Dear *[add name]*

Congratulations on your recent appointment to the organisation. We would like to take this opportunity to welcome you to your new position with us.

I am writing to outline the arrangements for your induction process so that we can make your transition to us as smooth as possible. As an organisation we recognise the importance of the induction process, and to emphasise this we also provide some pre-induction support. This involves us sending you some information to look through before your first day with us. We hope that this will answer any queries that you may have.

Alongside this letter I have included some additional information on the organisation that you may find interesting. This includes a copy of our latest annual report and a copy of the latest edition of our newsletter. We hope that this will give you an interesting insight and that you will enjoy reading about your new organisation and colleagues. *[Delete this paragraph if it is not appropriate.]*

Approximately two weeks prior to your start date we will be sending you the pre-induction materials through the post (if you would prefer to receive this information by email, please let us know). Your pre-induction pack will include organisation-wide information as well as materials specific to the team that you will be joining and your individual role. We will also provide details about the formal induction process that you will follow during your first few days in the organisation. In addition, we will provide you with the direct contact details of your line manager and HR contact so that you can get in touch with them if you have anything you would like to discuss before your start date.

Please do not hesitate to contact me if you require any additional information at this stage.

Yours sincerely

[Name of contact]



Tool 1.2

Pre-induction information for employees

Facilitator's notes

Introduction

The process of joining a new organisation should be made as smooth as possible for new employees because this can be a stressful time.

Aim of the Tool

To provide new employees with some key information about their new organisation and job before they attend their new workplace.

Materials needed

- Handout 2, 'Letter to accompany the pre-induction materials'
- Handout 3, 'General information on the organisation'
- Handout 4, 'Personal letter from the line manager'
- Handout 5, 'The things you need to know on your first day'
- Handout 6, 'An overview of the formal induction process'
- Worksheet 1, 'Pre-induction activity'

Set-up instructions for trainer

- Personalise Handouts 2, 3, 4, 5 and 6 before they are sent to the new employees with the rest of the documents outlined in the 'supporting materials' section.
 - Handout 2 requires you to personalise the letter and check that all of the other information is appropriate.
 - Handout 3 requires you to generate a set of general information about the organisation or insert a copy of an existing document.



- Handout 4 requires you to liaise with the line manager(s) of the new employees and ask them to provide a general introduction. Once this letter has been generated by each department, they can be updated quickly for future induction sessions.
- Handout 5 requires you to complete some of the key information and delete anything that is not relevant in your organisation. You may also wish to add information.
- Handout 6 needs to be updated with specific details so that it gives an accurate representation of the induction programme that the new employees will follow.

Procedure

- The materials for this section should be sent to new employees approximately two to three weeks before their start date with the organisation.



Handout 2

Letter to accompany the pre-induction materials

Dear *[add name]*

Following on from my previous letter to welcome you to our organisation, I am pleased to enclose some pre-induction materials for your perusal.

We believe that induction is a really important process because it allows you to have the opportunity to find out more about the organisation and department that you will be working in. You will also be able to meet some of your colleagues as well as get to know your fellow new starters.

I would be grateful if you would read through the enclosed materials and bring them with you on your first day. It is particularly important that you bring your completed pre-induction activity so that you can discuss the contents with your new colleagues and make sure that you get answers to all of your initial questions.

My colleagues and I hope that this information will be useful to you and will allay any concerns that you may have about your first day in your new job. We have also provided an outline of the induction programme so that you can be assured that we will be providing a high level of support to help you integrate into our organisation.

Please do not hesitate to contact either myself or your new line manager if you have any queries in advance of your first day on site.

Yours sincerely

[Name of contact]



Handout 3

General information on the organisation

[You may decide to replace this handout with an existing document that is used by the organisation to explain who they are and what they do. If such a document does not exist, you may wish to construct a new document which incorporates the answers to the questions provided below:

- *What does the company do?*
- *What is the structure of the organisation? Are there any branches/subsidiaries/parent companies?*
- *a brief overview of the organisation's history*
- *Does the company have any accreditations or has it won any awards?*
- *number of employees*
- *any other relevant key facts.]*



Handout 4

Personal letter from the line manager

[The line manager should provide a brief introduction to their department/team. This may include the following:

- *a brief overview of what the key activities of the department are*
- *a list of staff, with job titles and contact details*
- *an outline of the department's targets/objectives for the forthcoming year*
- *details of any particular success stories.]*



Handout 5

The things you need to know on your first day

This handout is intended to clarify some of the practical information that you might need to know to make your first day as comfortable as possible.

Finding us	If you are using satnav, our postcode is <i>[add detail here]</i> . Information on local public transport can be obtained from <i>[add website of relevant company here]</i> .
Car parking arrangements	On-site parking is/is not <i>[delete as appropriate]</i> available. Offsite parking is available at <i>[add location]</i> and is charged at an hourly rate <i>[if appropriate]</i> .
Facilities for refreshments	A vending machine/kitchen <i>[delete as appropriate]</i> is available for hot and/or cold drinks. The canteen provides both hot and cold meals and snacks. <i>[or]</i> Many employees bring packed lunches with them or visit one of the food outlets located in the close vicinity of the organisation <i>[delete/amend as appropriate]</i> .
Break entitlements	All employees receive a <i>one-hour</i> lunch break and <i>two ten-minute</i> refreshment breaks <i>[delete/amend as appropriate]</i> .
Reporting arrangements for day one	You should report to the main reception by <i>[add time]</i> and ask for <i>[add name]</i> , who will collect you and begin the induction process.
Start and finish times for day one	During the induction process, your start and finish times will be as follows: Start: <i>[add time]</i> Finish: <i>[add time]</i> Your line manager will confirm your normal working hours (or arrangements).
What you need to bring with you	Any paperwork that has been specifically requested by the HR Department for administrative purposes.



Handout 6

An overview of the formal induction process

Session	Broad overview of content	Colleagues who you will meet*	Additional information
1	Introduction to the organisation • who we are and what we do • organisation structure • housekeeping • culture • support and advice	• HR representative/trainer • at least one member of the senior management team • your line manager • colleagues from your new team	Please bring your completed pre-induction worksheet with you to this session.
2	Statutory information • health and safety • data protection • environmental management • equality and diversity • sickness absence procedures	• HR representative/trainer • health and safety representative (if appropriate)	You will be provided with copies of the relevant policies during this session.
3	Policies, practices and processes • terms and conditions • training and development • performance management • discipline and grievance • administrative processes	• HR representative/trainer	Please bring a copy of your terms and conditions of employment with you. You will be provided with copies of the relevant policies during this session. The administrative processes section will begin by looking at generic processes and then there will be an opportunity to look at job-specific processes.



Session	Broad overview of content	Colleagues who you will meet*	Additional information
4	Job/role-specific information • organisation, department and team structures • departmental and team induction • roles and responsibilities • using ICT and other equipment	• HR representative • line manager • colleagues from your new team • IT representative	The IT representative will provide you with all of the necessary information to allow you to access your computer and email accounts. You will spend time with your line manager and new colleagues as part of the departmental/team induction.
5	Evaluating the induction process and moving forward • verifying that training needs have been met • identifying areas for future development	• HR representative/trainer	Your trainer will outline any further induction sessions that will take place outside of the first week/set of sessions.

* subject to availability – it may be necessary for additional introductory meetings to take place outside of the formal induction process.



Worksheet 1

Pre-induction activity

Please complete this activity in advance and bring it with you on your first day in the organisation.

Activity 1

As part of your induction you will be getting to know your new colleagues and spending time with other new employees. Prepare a short introduction of approximately 90 seconds about yourself (as detailed below) that you would be happy to share with others (asking you to think about this in advance is useful as sometimes people are nervous on their first day!).

You will have 90 seconds to introduce yourself to your partner; you should share the following information (as a minimum):

- name
- role that you have been appointed to
- why you wanted this job and whether or not it is similar to your previous job (if appropriate)
- If you won £5 million on the lottery, what would you spend it on?

Activity 2

Please tackle the following activity to facilitate one of the ice-breaker sessions that you will participate in with your new colleagues.

Working in pairs you will be asked to exchange three statements about yourself; two of your statements must be true and one should be false. You should try and make it difficult to guess which one is false. Previous examples of statements which were true (but everyone assumed were false!) include:

- I have had dinner in the White House.
- My cousin is in Dire Straits (the band).
- At weekends I go wind-surfing.



Activity 3

Make a list of any general questions that you would like to be answered within your formal induction programme.

Activity 4

Review the job description that you received when applying for this job and make a list of any areas of your new role with which you think you might need support.

Activity 5

Review the content of the induction programme that you have been sent and make a note of any areas that you think we might have forgotten about – you will have the chance to ask us about this within the induction programme.



Tool 2.1

Who are we and what do we do?

Facilitator's notes

Introduction

It is important that new employees are given an understanding of their new organisation so that they can see how they can fit in and contribute.

Aim of the Tool

To introduce the new organisation to the employee and to help them understand what the organisation does.

Materials needed

- Worksheet 2, 'Ice-breaker activities'
- Presentation 1, 'An introduction to the organisation'

Set-up instructions for trainer

- Personalise the information provided in Presentation 1 so that it contains all of the relevant information for your organisation.

Procedure

- The duration of this task should be approximately 25 minutes.
- If this is used as the first part of the induction session, the trainer could choose to use one (or both) of the ice-breaker activities provided on Worksheet 2.
- The trainer should go through the information in Presentation 1 and may wish to provide a copy of the slides to the participants.
- The participants should be encouraged to ask any questions that they might have.



Worksheet 2

Ice-breaker activities

These activities have been designed to 'break the ice' and allow you to get to know each other. You should be ready to complete Activity 1 using the facts that you made a note of as one of your pre-induction activities.

Activity 1 – speed dating

Break up into pairs to begin the activity. You will have 90 seconds to introduce yourself to your partner; you should share the following information (as a minimum):

- name
- role that you have been appointed to
- why you wanted this job and whether or not it is similar to your previous job (if appropriate)
- If you won £5 million on the lottery, what would you spend it on?

After both of you have shared these details with each other you will move on to a new partner. You should be prepared to introduce your partner to the rest of the group if requested by the trainer, so try to make a note of what they have told you!

Activity 2 – interesting facts about your new colleagues

Find a new partner so that you can work in pairs and then take turns to share your three facts. After you have provided your three facts, your partner needs to decide which one is false. You should then reverse the roles so that you can guess which one of your partner's facts is false.

Activity 3 – identifying common queries

Working in pairs or small groups, discuss any of the initial queries that you outlined on your pre-induction worksheet. As a group identify any common issues and then pose them to your trainer. Remember to make a note of the answers that you are given!



Presentation 1

An introduction to the organisation

An introduction to the organisation

Overview

- Welcome to the organisation
- A brief history
- Our main activities
- Aims and objectives
- Success stories/in the press
- Introduction to senior management team
- Any questions?



A brief history

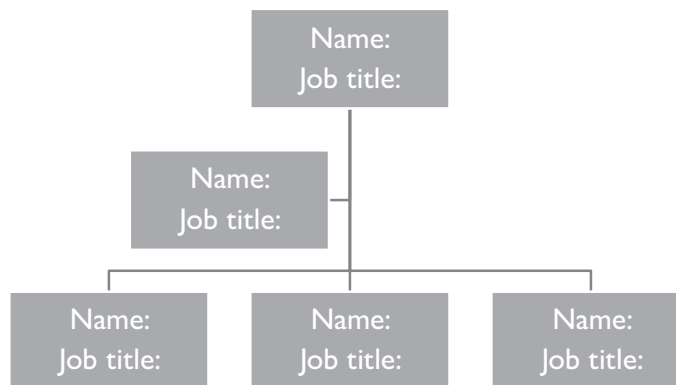
Our main activities

Aims and objectives



Success stories/in the press

Introduction to senior management team



Any questions?



Tool 2.2

Organisation structure

Facilitator's notes

Introduction

It is important for new employees to have a good understanding of how the organisation operates and where their role sits within the organisation.

Aim of the Tool

New employees will gain an understanding of how the organisation is structured and where they (and their department) will be located within the organisation.

Materials needed

- Handout 7, 'Organisation structure'
- Worksheet 3, 'Setting your new role in the organisational context'

Set-up instructions for trainer

- Access Handout 7 and amend the organisation structure so that it is in line with your organisation structure.
- Make sure that you are aware of where the new employees will be situated within the organisational structure so that they can add the appropriate details to Worksheet 3.

Procedure

- The duration of this task should be approximately 15 minutes (may be longer if the organisation has a more complicated structure).
- Address each new employee in turn so that they can see where they will fit into the organisational structure. Encourage the employee to make a note of the key details on Worksheet 3.
- Inform the new employees that we will be looking at the structure in more detail within Section 5 of this Toolkit.