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TIP SHEET #5

ORIENTATION

Refer to Summary of Resources
Tip Sheet #12 for a listing of
information sources.

diversity

An Employer Advantage

Alberta

Tip Sheet 5: Orientation

A thorough orientation to a new workplace is key to boosting retention and making a new employee feel welcome and included. The orientation should be designed to set expectations and clarify workplace policies and procedures. For new immigrant employees, it's critical to include workplace culture, values, expectations, and behaviors that are not easily known, written down, or conveyed and which can be overlooked when the workforce is largely made up of individuals who share a cultural background. Orientation material can be used to minimize misunderstandings and save time and resources in the future. This tip sheet will help you develop a comprehensive orientation specifically for Newcomers.

1 What is orientation?

- Orientation is the first step of onboarding.
- The purpose of workplace orientation is to give new employees important information about their workspace, equipment, pay, benefits, and dress code.
- Orientation also introduces new employees to their coworkers and begins to integrate them into the company culture.



2 Consider the Three P's:

- **People:** Who are the key people whom new employees must meet, what will those meetings look like, and when should they occur? Examples include: informal social events, group onboarding activities, assigning a buddy or mentor, meetings with senior leaders, team building, mentoring, and other key meetings.
- **Performance:** What is required to support any new employee in the performance of their role? Examples include: job shadowing, setting expectations, providing feedback, HR check-ins, coaching, and other training.
- **Paperwork:** What paperwork and processes must be reviewed, completed, and explained? Examples include orientation, employee handbook or policies, resources, and forms.

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3 Welcome email checklist:

- Send an email to your new employee prior to their first day of work.
- Send a welcome to the team message.
- Include the starting date, time, location, and parking information.
- Provide the name, phone number, and email of their contact person.
- Provide a list of the documents (Social Insurance Number, banking information, required certifications, etc.) they will need for their first day.
- Include schedule breakdown of their first day.
- Explain the dress code, if there is one.
- Attach your company informational documents and link to your company's employee handbook.



4 Pre-orientation checklist:

- Send out a company-wide email announcing the new hire, with their name and position. Announce their start date, and which office or department they will be working from, and inform co-workers of the time and place for a meet-and-greet (if possible).
- Make sure that the head of their department is prepared for the new arrival.
- Assign a culturally sensitive mentor that will provide regular and detailed feedback to the Newcomer on their job performance, and to help with day to day questions.
- Define where the new employee's workstation or department will be.
- Order all necessary equipment, supplies, security cards, and keys.
- Create their accounts within the Human Resources system. This could include: creating a company profile/account, email, or any other needed accounts for the new employee.
- Add new employee to the birthday list.
- Prepare a welcome package, including Human Resources related documents and relevant company information.

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5 First day checklist:

- Greet the new employee at the door and introduce them to their colleagues.
- Introduce the Newcomer to their onboarding mentor. For the first while (up to 3 months) a mentor would take the responsibility of helping that individual navigate through the new position. For more details on mentoring, refer to the **Onboarding Tips Sheet**.
- Arrange a one-on-one meeting with their mentor or supervisor at the end of the day to find out how they are feeling or if they have any questions.
- Organize a tour of the building. Cover essentials such as entrances, restrooms, kitchen, and common rooms. Show the new employee to their workstation.
- Demonstrate and confirm they can log into their work station.
- Provide essential information such as: Employee Handbook, Policies and Procedures, and Health and Safety Regulations. Don't expect information to be absorbed in one sitting. Provide key materials in print form for future reference and let them know who to contact regarding future questions.
- Provide a clear outline of expectations and what a typical day will look like.



6 First day paperwork:

- Consider creating a specific Newcomer Orientation Package. It should provide a more detailed explanation of the paperwork required. Be sure to take the time to explain all documents very clearly and allow them to take it home to review and/or finish. Encourage them to ask questions if they aren't sure what the questions are asking.
- Employment Contract
- Income Tax forms
- Confidentiality Agreement
- Other company-specific documents

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7 First week checklist:

- Check in with the new employee daily for the first week to ensure they are not overwhelmed. Ask if they have any questions or require more information about anything.
- Confirm the Newcomer has had meetings with key people to their role.
- Check short term goals have been set.
- Check that all equipment and software needs are met.
- Instruct the new employee about security and fire measures,
- Plan additional training, if needed.
- Invite the new employee to participate in team-building activities.
- Confirm a one-on-one meeting with their supervisor and/or mentor at the end of the end of the week.

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First month checklist:

- Review how the employee performs and check how they are feeling about their job.
- Create and send a first month onboarding survey
- Set a meeting with the department head about the employee's progress
- Set a one-to-one meeting with the employee at the end of the month
- Check the employee's feelings about the job Invite the new employee to participate in activities for team members
- Plan and schedule a three month and six month survey for the employee



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**“Diversity is a fact,
but inclusion is a
choice we make
every day. As leaders,
we have to put out
the message that we
embrace, and not
just tolerate,
diversity.”**

**~ Nellie Borrero, Global Inclusion
and Diversity Managing Director at
Accenture ~**



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Provide a detailed orientation of the company:

General information about the company:

- products and/or services
- organization structures and leaders
- corporate telephone directory
- the location(s) of the company
- how to get around the building, including a site or building map

Function-specific information:

- names of supervisors and managers
- information on the employee's assigned work group
- corporate terminology glossary that includes acronyms
- health and safety requirements
- emergency and security procedures
- company policies and procedures
- company support services
- location of equipment needed for work
- how to access supplies

Provide orientation to the job:

- duties and responsibilities
- standards for judging performance
- reporting relationships
- expected interactions with co-workers, suppliers, and clients
- what to wear to work
- the correct time to arrive and leave from work
- what to do if sick or unable to work
- recreational and social activities
- wage structure and benefits
- training and development activities



For more tips and strategies to improve diversity in your workplace, check out our other Tip Sheets:

1. Job Descriptions
2. Recruitment and Job Sourcing
3. Assessing Skills and Competencies
4. Interviewing and Selection
5. Orientation
6. Onboarding
7. Creating a Welcoming and Inclusive Work Environment
8. Training and Development
9. Communication
10. Employee Retention
11. Common Terms and Definitions
12. Summary of Resources

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