

THE INDUCTION POCKETBOOK

By Ruth Sangale

Drawings by Phil Hailstone

“A well thought-out and concise guide that includes useful checklists for managers.”

Stephen Avery, Director Business Services, C.B.I.

“This is an essential tool for managers, to convey the right message to new employees. The importance of induction for employers cannot be underestimated.”

Lisa Hayley-Jones, Public Affairs Manager, KPMG

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High staff turnover prompted publishing company LBC to review its recruitment policy, resulting in the introduction of a modular induction programme. This case study follows the process that led up to the programme's adoption and looks at what it achieved.



SUMMARY

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The main points of the book, together with useful mnemonics, summarised under seven headings.



**"There is new strength, repose
of mind and inspiration in
fresh apparel"**

Ella Wheeler Wilcox



INTRODUCTION

INTRODUCTION

FIRST IMPRESSIONS



Catherine Brown arrived at her new job as an Accounts Manager in a medium-sized advertising agency with great expectations and enthusiasm. After a long recruitment process, she was sure this was the perfect job for her.

This was her experience:

- Arrived at 9.00 a.m. on Monday as informed; receptionist did not know who she was
- Waited 30 minutes for her new manager to come and get her
- 10 minutes into her meeting with him, he was called away and Catherine was left with his colleague, who was not prepared for this
- Colleague quickly showed Catherine around and then left her with documents to read
- An hour and a half and six cups of coffee later, Catherine was taken by her boss to a rushed lunch
- The afternoon was much the same as the morning and, finally, Catherine was allowed to go home early

Many of you may have had a similar experience. How did you feel?

INTRODUCTION

STRESSES OF A NEW JOB



Think back to the first day of your current job and the kinds of questions you asked yourself? Some of them may have been:

*What
will I be expected
to do?*

Who will I be working with?

*What
procedures will I
have to follow?*

*Where
will I be situated?*

Will I fit in?

A good induction will help relieve some of the stress by answering these questions.

INTRODUCTION

NEW BEGINNINGS



Facing a new job makes anyone feel anxious, some people more than others. The way in which you welcome, inform and integrate your new staff will have an effect on the rest of their stay in your company. Therefore, the better the introduction the easier it is for newcomers to settle in and identify the appropriate behaviour for success.

A good induction should **WIN** over your newcomers by:

Welcoming them to their new job, company and colleagues

Integrating them into the culture of the company

Navigating them around the company in both physical and strategic terms

This book will guide you to do this by looking at the why, who, what, how, when and where of induction and also by providing you with practical tips and examples of good practice.

INTRODUCTION

YOUR GAME PLAN

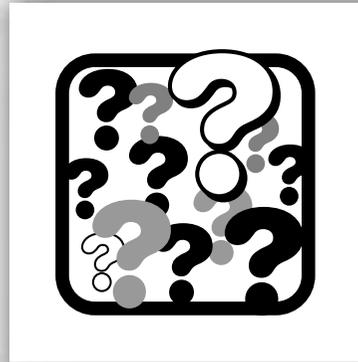


Whenever you are going to introduce a new procedure or process to an organisation, there are four things to think about in the planning stage:

- G**oal What is the objective for this new process? Is it to inform, sell or persuade? What is the desired outcome?
- A**udience Who are your audience? What are their needs, previous experience, etc?
- M**edia What is the most appropriate method of communicating this process - talks, staff packs, training?
- E**xpression Once a decision has been made about the media, consider the best way of expressing the message - formal/informal, use of graphics, visual aids, etc.

NOTES





WHY HAVE AN INDUCTION PROGRAMME?

WHY HAVE AN INDUCTION PROGRAMME?

MAIN GOAL: MAINTAIN MOTIVATION



Even though newcomers will have anxiety, they will also be feeling enthusiastic and motivated to do a good job. The main goal of induction is to maintain this enthusiasm and motivation for as long as possible. This will result in more effective performance.

You maintain motivation by providing your newcomer with:

- The right type of support and guidance
- At the right time
- In the right way

Throughout the book the term newcomer is used to include people who are new to a role, not only those new to the organisation.



WHY HAVE AN INDUCTION PROGRAMME?

MASLOW'S THEORY



A newcomer's journey from being nervous and insecure to becoming a confident member of staff who can contribute to the goals of the company, can be compared to the steps in Maslow's Theory of Motivation.

Everyone has needs and Maslow believed that these needs could be arranged in a hierarchy starting off with basic physiological needs and ending with more intellectually demanding needs.

Until a need is satisfied, a person cannot (or is not motivated to) move on to the next level. It is the same with induction: before newcomers can begin to understand the more complicated aspects of their jobs and company, and before they can be fully effective, they need to be comfortable with some basic knowledge.

WHY HAVE AN INDUCTION PROGRAMME?

MASLOW'S HIERARCHY OF NEEDS

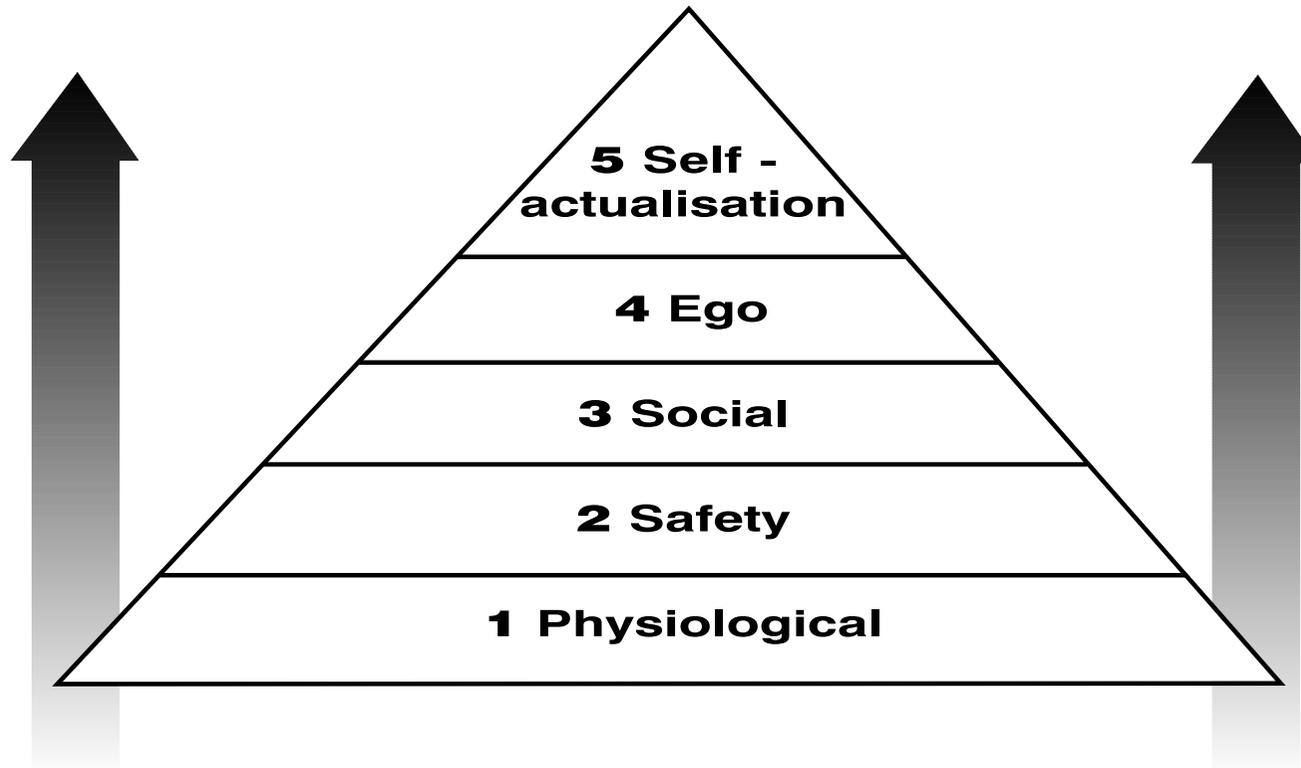


To understand the link with induction let's look at the needs:

- **Physiological** - basic biological needs, essential for survival, such as food, shelter and sleep
- **Safety** - includes protection from physical and psychological threats
- **Social** - the need for love, acceptance, friendship and social interaction
- **Ego** - includes a need for self-respect, confidence, recognition, power and competence
- **Self-actualisation** - self-fulfilment, achievement, realisation of potential

WHY HAVE AN INDUCTION PROGRAMME?

THE LINK BETWEEN NEEDS & INDUCTION



WHY HAVE AN INDUCTION PROGRAMME?

THE LINK BETWEEN NEEDS & INDUCTION



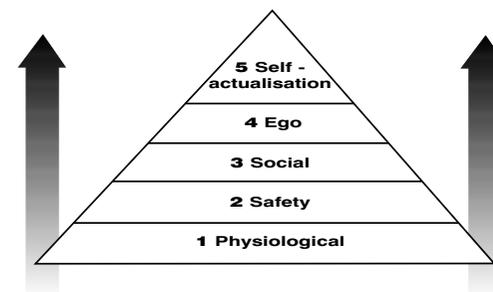
1 Physiological During the first few days newcomers require very basic and simple information in order to feel secure, like: knowing where they will be working, finding out where things are and learning the names of people.

2 Safety Over the next few weeks they establish a routine and are given assignments with clear guidance. Also they need to become familiar with company details such as its structure, aims and different departments.

3 Social They then start forming relationships with people, having coffee or lunch with some. They begin to get used to the procedures and, therefore, slowly fit in.

4 Ego As they understand their roles better and attend training they begin to gain in self-respect and become more effective.

5 Self-actualisation After 6-12 months, with the right environment, newcomers begin to fulfil their potential within their roles.



WHY HAVE AN INDUCTION PROGRAMME?

OBJECTIVES OF INDUCTION: *COMPANY*



Different organisations have different induction objectives. Before introducing an induction programme you must first be clear about why you are doing it. Objectives mainly fall into three groups: **company-**, **job-** and **newcomer-**related.

Company-related objectives include giving an understanding of:

- **The company:** its culture, structure, products and clients
- **Policies and procedures:** health and safety, performance management, discipline and grievance, pay, holidays, etc
- **Work objectives:** departmental and company goals

WHY HAVE AN INDUCTION PROGRAMME?

OBJECTIVES OF INDUCTION: *JOB*



Induction enables newcomers to understand their roles better by providing an opportunity to:

- Meet colleagues with whom they may be working
- Receive training to enable them to carry out their roles
- Understand their job descriptions and how they fit in with the company



WHY HAVE AN INDUCTION PROGRAMME?

OBJECTIVES OF INDUCTION: *NEWCOMER*



- To provide a sincere welcome
- To put newcomer at ease
- To give a good impression of the company
- To give an introduction to the culture of the company
- To integrate newcomer effectively
- To give newcomer skills and knowledge to do the job well

Your objectives for an induction programme may cover some or all of the aforementioned. Whatever your objective, a good induction programme will not only benefit the newcomer but will also benefit the company in many ways.

WHY HAVE AN INDUCTION PROGRAMME?



BENEFITS OF INDUCTION TO THE COMPANY

Financial

Many people leave a job because they are disillusioned, let down or misinformed. A good induction will illustrate to newcomers that the organisation is committed to them and will do everything it can to retain them for as long as possible. This results in reduction of staff turnover and recruitment costs.

Productivity

If newcomers are inducted well they will be able to respond quickly and effectively to the demands of their new roles.

Effect on existing staff

Induction can have two effects on existing staff:

- they become more aware of the company's objectives by contributing or attending, and
- those contributing can improve their skills such as coaching and presentation

WHY HAVE AN INDUCTION PROGRAMME?



BENEFITS OF INDUCTION TO THE NEWCOMER

Motivational

An induction programme should indicate what potential there is for growth and development within the organisation and how to capitalise on it. This will enable newcomers to work towards fulfilling their potential and, therefore, maintain their motivation.

Training and development

A good induction programme that includes training will encourage newcomers to get involved and support training and development in the future. It will also make them more effective in their roles.

Integration

Knowing how things are done in terms of accepted behaviour helps newcomers to integrate into the culture of the company.

WHY HAVE AN INDUCTION PROGRAMME?



ACTION

DEVELOPMENT ACTIVITY

- Get together a team of volunteers who can help design, develop, implement and monitor your induction
- That done, decide on your key objectives for having an induction





WHO TO INVOLVE



WHO TO INVOLVE IN DELIVERY



A common mistake in induction schemes is to leave it all to one person to organise. This puts a lot of pressure on that individual and may reduce the effectiveness of the scheme. It is advisable to involve as many people as you can in the process, by splitting the responsibility and making it more interesting.

Important people to include are:

- Senior managers
- Supervisors or line managers
- Person responsible for personnel issues
- Colleagues doing similar roles
- Colleagues from other departments with whom the newcomer may work





WHO TO INVOLVE IN DELIVERY



Senior managers

You should always involve the most senior manager in the induction process because:

- It demonstrates that person's commitment to the process, and therefore...
- Other staff who are contributing to the induction will take it more seriously
- Newcomers will be impressed that even the most senior member of staff has time to welcome them

The senior manager can assist in a number of ways:

- Provide a budget for the induction
- Speak at a presentation about the company history and future goals
- Meet the newcomer (if a small company)



WHO TO INVOLVE IN DELIVERY



Line managers

The line manager is probably the most important person in the induction process. This is the person whom the newcomer will be working for. The impression this person makes in the first few days will be a lasting one. It is essential, therefore, that the line manager allows enough time to spend with the new team member.

In the first few weeks the line manager should:

- Make the newcomer feel welcome and at ease
- Introduce the person to the rest of the team
- Go through the job description
- Go through the objectives of the team and current projects
- Provide lots of opportunity for regular feedback
- Set some objectives that are realistic for the newcomer to achieve in the first 2-3 months



WHO TO INVOLVE IN DELIVERY



Personnel representative

If your company does not have a personnel function, then whoever is responsible for the following should do this part:

- Check that newcomer's details are correct
- Obtain a security pass if required
- Go over any housekeeping rules
- Go through terms and conditions
- Make introductions to anyone else in the personnel department who is relevant
- Provide a map of the office/sites
- Indicate how the person can find relevant information
- Provide telephone directories or important contact numbers





WHO TO INVOLVE IN DELIVERY



Trainers

If your company is one where specialist skills are required in order for newcomers to be able to do their jobs, inform the trainer of:

- Roles of newcomers
- Previous experience
- Timing

Such training could include:

- Use of tailored IT systems
- Company writing style
- Presentation skills
- Telephone skills
- Customer care
- Filing systems
- Use of specialist equipment





WHO TO INVOLVE IN DELIVERY



Other staff

It may be useful to involve other staff and this can be done in several ways:

Job shadowing

Arrange for the newcomer to spend time with someone who is doing the same or similar job. This may help prevent mistakes or misunderstandings.

Buddying

Allocate to another member of staff the responsibility of offering support and guidance to the newcomer during his or her first few weeks.

Work placements

Let the newcomer spend time at different sites, for example on the shop floor or in the factory, so that the person can understand the work of other departments.



WHO TO INVOLVE

IN DELIVERY

TRAINING THOSE INVOLVED



Although managers may be experts in their particular fields, don't assume that they will know how to impart their knowledge. Get everyone involved in the induction to come to a half-day workshop where you can go through:

- The aims and objectives of the induction programme
- The different parts of the induction and how they are linked
- Tips on presentation skills
- Guidelines on visual aids
- Checklists of each person's role
- Coaching skills for the line manager

It is important that everyone with a role goes through this.





WHO TO INVOLVE

IN HAVING INDUCTION



Induction is not just for newcomers, but for anyone who is in a new situation at work or who has special needs. Induction, therefore, will include:

- Staff newly promoted
- Staff transferred
- Staff requiring re-orientation after major change
- People returning after a long break, eg: after illness or maternity leave
- Part timers/shift workers
- Those on temporary contracts
- Graduates/school leavers
- Work experience placements
- People on secondment

You must decide which parts of the induction will be relevant to them as they may not need all the information that a newcomer will receive.



WHO TO INVOLVE

IN HAVING INDUCTION

LOOKING AFTER DIFFERENT NEEDS



When designing your induction programme, allow it to be flexible to accommodate the different needs of staff. In particular:

- Women returning to work after a long break
- Graduates/school leavers
- Part-timers
- Disabled people
- Those transferred and promoted



WHO TO INVOLVE

IN HAVING INDUCTION



Women returning to work

Take into account the fact that:

- They may have lost confidence
- Their skills may be out of date
- They will need updating on company changes that have taken place while they were absent
- They may prefer one-to-one coaching rather than group training where they may feel unable to keep up with the rest of the group





WHO TO INVOLVE IN HAVING INDUCTION



Graduates and school leavers

Some companies that hire large numbers of graduates will have a special graduate induction programme. However, this is not always necessary. What you need to think about is that many graduates have never worked before and, therefore, will need assistance with items that for others may seem unnecessary.

For example:

- How the photocopier and fax work
- Filing systems
- Dealing with customers and clients
- Change from academic style of working to a more pragmatic one
- How to meet deadlines within work hours



Remember, some may need confidence building and a buddy would probably help with this.



WHO TO INVOLVE

IN HAVING INDUCTION



Part-timers/shift workers

These people often get overlooked because they are not always available to attend the induction with other staff. However, it is important that they are treated in exactly the same way as a permanent newcomer would be by:

- Arranging training and presentations when they are able to attend
- Compensating them if they have to attend during their own time
- Allowing more time for them to get through the programme because they are not at work all of the time and, consequently, they may take longer to integrate



WHO TO INVOLVE

IN HAVING INDUCTION



Disabled people

It is now law that an employer must make reasonable adjustments to accommodate disabled persons. The best way to do this is to ask newcomers what it is they may need. This will depend on the disability but can include:

- Wheelchair access
- Special IT equipment such as larger screens or Braille keyboards
- Signer

For more information on what is available, contact your local job centre.



WHO TO INVOLVE

IN HAVING INDUCTION



People on secondment and work experience

Even though these people are not permanent, it is still important that they are given the same introduction as permanent staff. This will enable them to be effective in what they are to achieve while they are with you.

Also it gives them a good impression of your company. Sometimes they may end up getting a job with you!





WHO TO INVOLVE IN HAVING INDUCTION



People transferred and promoted

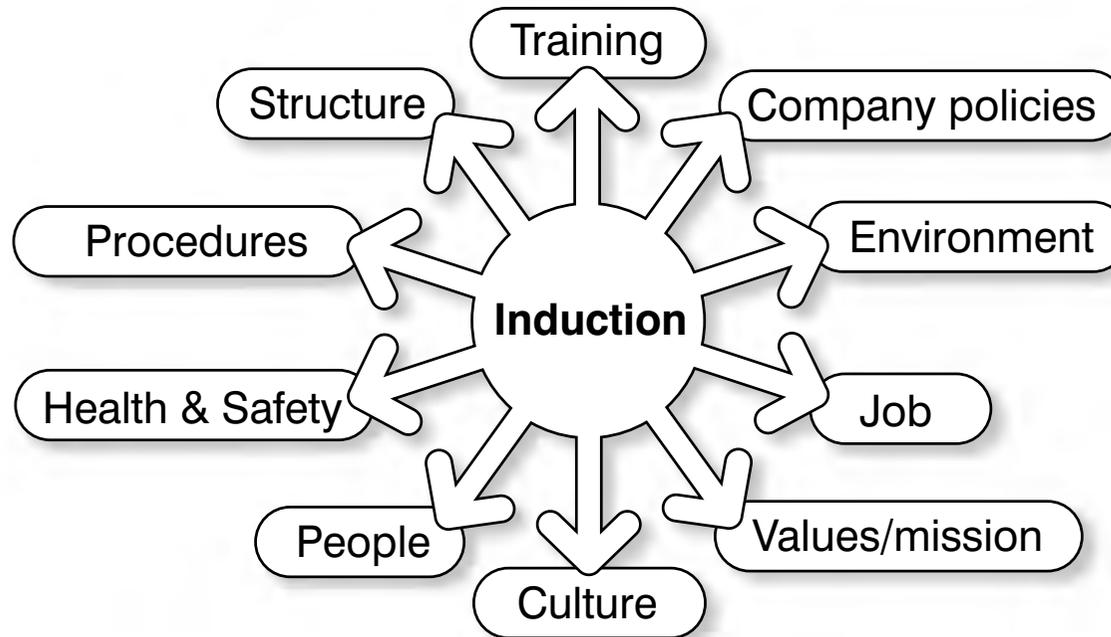
This is another group of people who tend to get forgotten. It is assumed that because they already work in the company they will not need induction. Useful for those people who have been promoted or transferred is:

- Information on their new role (a written description and explanation by new manager)
- Introduction to new team
- Integration into the team culture
- Training if new skills required



WHAT TO INCLUDE IN AN INDUCTION PROGRAMME

WHAT TO INCLUDE IN AN INDUCTION PROGRAMME



When you have clear objectives for your induction, you must then decide what information you need to support these aims.

WHAT TO INCLUDE IN AN INDUCTION PROGRAMME

ACTION

DEVELOPMENT ACTIVITY



Undertake a staff survey to find out:

- What people found useful during their first few months on the job
- What people did not find useful
- What could have been done to make their integration easier

Don't forget to include:

- People who have been promoted to a new job
- People who have transferred to a new department

Think about it yourself – what would have been useful in your first few weeks?

WHAT TO INCLUDE IN AN INDUCTION PROGRAMME

THE FOUR Ps



The sort of information that people generally find useful falls into four categories:

- **Place** – structure of company and physical surroundings
- **Policies** – how to behave in various situations
- **Position** – their job role and how it fits into the company
- **People** – who they will be working with

Information about all four Ps will show the newcomer the best way to fit in.



WHAT TO INCLUDE IN AN INDUCTION PROGRAMME

THE FOUR Ps: *PLACE*



Employer information

What do you know about the history and aims of your employer?

How does your role contribute towards achieving these aims?

Many people are unable to answer these questions. However, this information is essential if newcomers are to be motivated and clear about their roles. Information about the employer should cover:

- A brief history
- Aims and objectives
- Organisational structure
- Products or services
- Function and role of the departments

WHAT TO INCLUDE IN AN INDUCTION PROGRAMME

THE FOUR Ps: *PLACE*



Physical surroundings

This aspect is easily overlooked but is very important for someone who is not familiar with the work surroundings and who may find it embarrassing to keep asking where things are. Therefore, a tour is essential, no matter how large or small the site may be. Include:

- Entrances and exits
- Canteen or location of coffee machines, kitchens
- Notice boards
- Post room
- Fax and photocopier
- First aid room
- Cloakrooms
- Other sites, factory, shops

You may add or leave out what is or is not applicable to your premises.



WHAT TO INCLUDE IN AN INDUCTION PROGRAMME

THE FOUR Ps: *PLACE*



ACTION

Development activity

If you do not have a formal **welcome pack**, you can begin to create one by:

- Speaking to managers about their teams/departments
- Sending out short questionnaires to people, asking for information on what they do and whether they have any documentation or leaflets to assist you
- Gathering information such as annual reports, brochures and organisation charts

You'll be surprised just how much information exists that you didn't know about!

Remember to refer back to the survey done previously to find out what it is that people would find useful. Then use this information to put together a welcome pack.

WHAT TO INCLUDE IN AN INDUCTION PROGRAMME



THE FOUR Ps: *POLICIES*

Information on policies covers procedures and guidelines on what to do in various situations. It can include any of the following:

Personnel policies

- Terms and conditions
- Benefit entitlement
- Salary payments: when, calculation, how paid
- Sick leave rules
- Holidays
- Grading structure
- Promotion
- Disciplinary system
- Grievance

Continued 

WHAT TO INCLUDE IN AN INDUCTION PROGRAMME

THE FOUR Ps: *POLICIES*



Communication policies

- How staff are informed
- Staff representative body
- Consultative arrangements
- Notice boards
- E-mail
- Intranet
- Meetings
- Trade union
- Internal TV channel
- Informal social gatherings

Health and safety policies

- Safety rules
- First aiders/equipment
- Location of fire exits
- Policy on smoking
- Accident reports

WHAT TO INCLUDE IN AN INDUCTION PROGRAMME



THE FOUR Ps: *POLICIES*

ACTION

Development activity

When deciding what to include in an induction programme, it often comes to light that there is a lack of documentation giving guidance to staff and that the only way to learn is through mistakes or word of mouth.

Your induction team could, therefore, gather any forms or guidelines that already exist and develop the rest with the assistance of the people responsible for that particular area.

Ensure all your guidelines follow a consistent format and clearly indicate:

- The objective for having the policy
- The step by step procedure
- The person responsible

Remember to use **GAME** (see Introduction).

WHAT TO INCLUDE IN AN INDUCTION PROGRAMME



THE FOUR Ps: *POSITION*

Job description

Newcomers should be informed exactly what is expected of them so that they have every opportunity to do a good job. The best way to do this is through a job description. This should include:

- An explanation of the team/department role
- The main function of the position
- The key tasks or responsibilities
- The interface with other people/departments
- The equipment/facilities to be used
- What the newcomer will be working on initially



WHAT TO INCLUDE IN AN INDUCTION PROGRAMME

THE FOUR Ps: *POSITION*



Training and development

If your company trains staff and monitors their development, you will need to go through:

- How training needs are assessed
- What training is available
- Who is responsible
- What the procedure is for requesting training

Don't forget, training can mean: coaching, mentoring, work experience, books, seminars, courses.

WHAT TO INCLUDE IN AN INDUCTION PROGRAMME

THE FOUR Ps: *POSITION*



Performance management

Whatever method you have of reviewing staff performance, however formal or informal, it is important that newcomers are made aware of this so that they know what to expect.

Give them:

- A copy of forms used
- An explanation of the procedure
- Details of who is involved
- Timings when the process occurs
- Details of their involvement/preparation

WHAT TO INCLUDE IN AN INDUCTION PROGRAMME



THE FOUR Ps: *PEOPLE*

When you first started your job, there were probably a lot of people you wished you had met earlier who would have made it easier for you to settle in. Who specifically can be of help to the newcomer will vary according to that person's role. Generally, it would be beneficial to meet and spend time with:

- The line manager
- Whoever deals with personnel issues such as pay and holidays; in some cases this may be the line manager
- A member of the senior management team
- Team members, if working in a team
- Any other members of staff that the newcomer will be interfacing with
- Clients if relevant
- Someone doing a similar job



HOW TO IMPLEMENT INDUCTION

HOW TO IMPLEMENT INDUCTION

THINGS TO THINK ABOUT



Once you have got a committed team of people prepared to contribute and have received feedback on what information/activities would be useful, the most important part is to decide how to deliver this so that it is beneficial to the recipients. This means thinking about:

- Structure
- Length
- Timing
- Fitting in with company culture
- Method of delivery, including media and expression



HOW TO IMPLEMENT INDUCTION

STRUCTURE



There are two main formats that induction can have:

- Modular
- Continuous

A modular format involves splitting the information into blocks and delivering it at different stages during the first few months of a newcomer joining. Some companies may have an induction that lasts six months; others continue for up to a year.

The alternative is to do the induction continuously over a period. This can range from one day to two weeks in some big organisations.

HOW TO IMPLEMENT INDUCTION

STRUCTURE

PROS & CONS OF EACH STRUCTURE



Modular		Continuous	
Pros	Cons	Pros	Cons
Information given over time so able to assimilate better	Takes longer	All done in one go so less disruptive	May be too much to take in
You can pick and choose which parts are relevant depending on the newcomer	May have to wait for appropriate part to come round again	Everyone given the same information at the same time	May not always be relevant
Opportunity to try out new knowledge before receiving more information	May limit the amount of work that can be done	Able to do all aspects of the job since given all information at once	May not do tasks well owing to information overload

HOW TO IMPLEMENT INDUCTION

LENGTH



The length of the induction programme depends on:

- Structure of the company
- Structure of the programme
- Amount of information/activities involved
- Newcomer's role
- Newcomer's previous experience
- Whether newcomer has been promoted, transferred or newly appointed

This will differ from company to company.

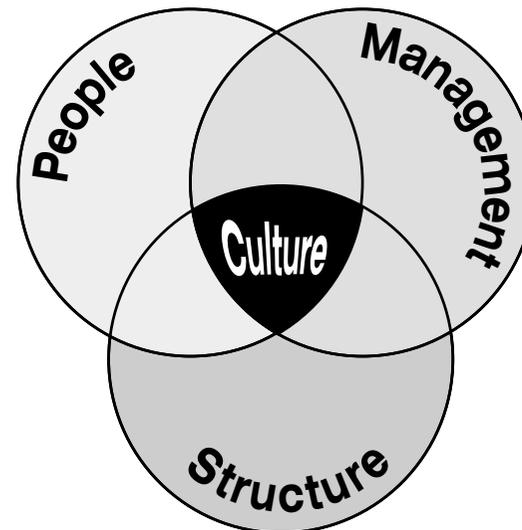
HOW TO IMPLEMENT INDUCTION

CULTURE



All companies, like people, have specific features and characteristics that make them what they are. As part of the induction programme, these characteristics need to be conveyed to newcomers so that they can integrate with ease.

They fall into three categories:



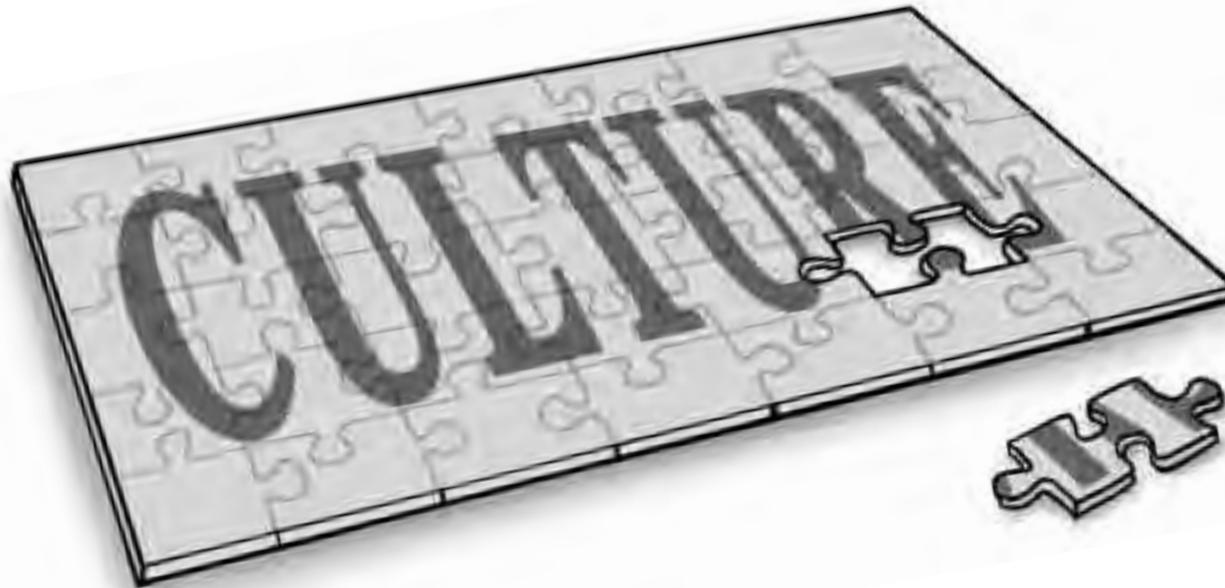
HOW TO IMPLEMENT INDUCTION CULTURE



ACTION

Development activity

With your induction team, go through the list of questions on the following pages to identify your company culture.



HOW TO IMPLEMENT INDUCTION CULTURE

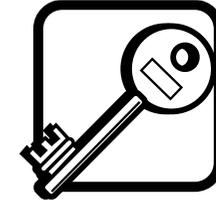


People

- What is the typical background; are they all graduates, professionals, etc?
- What is the largest age group?
- What is the ethnic mix?
- What is the male/female ratio?
- What is the dress code?
- What is the average length of service?
- What is the social calendar like?

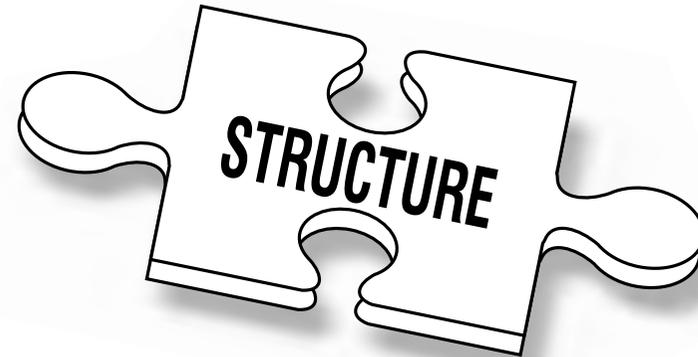


HOW TO IMPLEMENT INDUCTION CULTURE



Structure

- Number of staff?
- All in one location or different sites?
- Is the company 'flat' or are there many layers of management?
- To what extent is technology used?
- Is the layout open plan or individual offices?
- Modern or traditional offices?
- Private or public sector?
- What are the main operations?
- What is the main activity: selling, producing, consulting, etc?



HOW TO IMPLEMENT INDUCTION CULTURE



Management

- What is the mission or key objectives of the company?
- Are there rules and regulations?
- Does the company use policies and procedures?
- How is information communicated?
- Are there job descriptions and organisational charts?
- Is there a training and development strategy?



HOW TO IMPLEMENT INDUCTION CULTURE



Integrating your culture into the induction

By going through the questions on the previous pages, you can devise a cultural profile of your organisation. Below is an example of a cultural profile for a public relations company:

*Informal, private sector, non-bureaucratic company,
concerned with managing the public profile of a range of
pharmaceutical products and where the people who provide
the service are responsible for all aspects of the work.*

When putting your cultural profile together, it is essential that all those involved agree that this is a true representation of the company.

HOW TO IMPLEMENT INDUCTION CULTURE



Integrating your culture into the induction: practical tips

Once you have your cultural profile, use this to design and deliver an induction programme that demonstrates the company culture to the newcomer.

- If there is a formal dress code, make sure all involved represent this
- If there is a language style, make sure that the tone, style and pitch of the documentation and presentations reflect this
- Be honest - don't present a picture of the company that is not true
- Be well organised and businesslike if that is what you want to portray
- Try to get a cross-section of staff involved to represent the company
- If you are a high-tech company, use technology as much as you can; for example, in presentations and storing company information

HOW TO IMPLEMENT INDUCTION

METHOD



To make your induction interesting and ensure that information is retained, use a variety of methods to convey the message. Bear in mind that different people have different:

- Learning styles
- Previous experience
- Levels of seniority



HOW TO IMPLEMENT INDUCTION

METHOD



Written material

This is usually the best method of imparting initial information about the company role and its terms and conditions. Ideally, written information should be issued before the newcomers actually start, so that they have time to digest it. If necessary, they can ask for any clarification once they start work. Remember:

- Update regularly
- All information must be expressed in company style or 'language'
- It must reflect your company culture
- It should be easy to follow and understand
- Use tables, diagrams and charts where you can
- All information must be relevant to the newcomer
- Use photos of key people if you can
- Direct them to your website if you have one
- Make it exciting - if you find it boring, everyone else will!

HOW TO IMPLEMENT INDUCTION

METHOD



Coaching

Coaching is a day-to-day activity carried out by the line manager. For coaching to be a success there are some points to bear in mind:

- The manager must be committed and see this as part of his or her job
- The manager must have the right combination of knowledge, skill and attributes
- The coaching must be a structured two-way process



HOW TO IMPLEMENT INDUCTION

METHOD



Formal training

Use this when the newcomer needs to learn skills that are essential for the job, such as company-specific IT, company writing style and customer care. When deciding what training is relevant make sure:

- You have identified all skills and knowledge that need to be covered by the training
- It is tailored to suit attendees' age, background and experience
- You have considered how the training will be delivered
- You have decided how the benefits of the training will be assessed

HOW TO IMPLEMENT INDUCTION

METHOD



Group work

This can be useful for integrating newcomers into the teams they are going to work with. Group work can include activities such as:

- Team briefings on current projects
- Business games
- Case studies
- Role plays
- Away days

For all of these activities, ensure that you have a clear objective - ie: why the team is doing the chosen activity - and some kind of follow-up or action plan.

HOW TO IMPLEMENT INDUCTION

METHOD



Visiting different parts of the company

A programme of visits to different departments is useful if it is relevant to the newcomer's job. You must make sure, however, that those being visited are prepared and have a structured programme for the newcomer to follow. Example:

- Explain objective of the visit
- Explain what the department/office does and how it links in with the newcomer's work
- Get the newcomer to shadow a departmental member for a day or two
- Arrange for the newcomer to attend useful meetings or events that demonstrate the work of the department
- Ask the newcomer to write a short follow-up report on the visit

HOW TO IMPLEMENT INDUCTION

METHOD



Work placement

Some companies organise 1-2 weeks' work placement in different parts of the organisation, to enable the newcomer to understand what each part does and how they all fit together. This is useful in cases where you have:

- A factory
- Regional offices
- Shops
- Press office

The placement should involve some shadowing and some actual work. It is particularly useful for new managers who are going to be responsible for the people working in those parts of the company.



HOW TO IMPLEMENT INDUCTION

METHOD



Buddying

Buddying is a really useful way of imparting *unofficial* information to a newcomer. It is very effective if done carefully and doesn't require a lot of resources in terms of organisation and cost.

A buddy is usually someone doing a similar job or of similar status who volunteers to take care of a newcomer for his or her first few months.

The buddy must:

- Be knowledgeable about the company
- Be willing to put time aside to spend with the newcomer
- Have a sympathetic ear when the newcomer is having difficulties

HOW TO IMPLEMENT INDUCTION

METHOD



Presentations

Presentations are commonly used for induction training as they can be more interesting than written material and can cover a considerable amount of detail. For better retention, break up your presentations into half-day blocks.

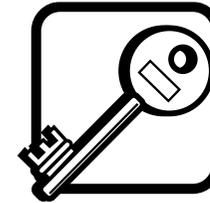
Remember:

- All presenters should be trained
- All visual aids should be uniform in appearance and in the company house style
- Check all material is up to date before using it



HOW TO IMPLEMENT INDUCTION

METHOD



Presentations: example

Time	Topic	Method	Speaker
9.30-9.45	Coffee and registration, issue handouts	Handouts	Facilitator
9.45-10.00	Introductions and ice breakers	Activity	
10.00-10.30	History of the company Mission, aims and objectives	Talk using slides/company video Question and answer	Managing Director

Presentations: example (Cont'd)

Time	Topic	Method	Speaker
10.30-11.15	Outline of services/products, how company works to serve its customers, outline of different departmental roles	Talk Question and answer	Manager of department
11.15-11.30	Coffee break		
11.30-12.00	Health and safety – fires, first aid, security	Video	Health and safety officer (or whoever deals with this)
12.00-12.30	Training and development: what is available, how this is reviewed, who is responsible	Talk using slides	Training person
12.30-1.00	Activity (eg: quiz) Questions Evaluation	Activity	Facilitator
Lunch	Invite staff to meet newcomers		

HOW TO IMPLEMENT INDUCTION METHOD



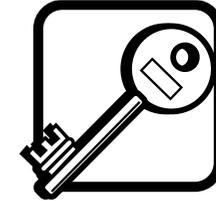
Presentations: tips to add interest

- Give information to attendees in advance so that they have a chance to read through material beforehand
- Allow for questions at the end of each presentation - ask attendees to prepare some in advance or they may sit there and look blank
- Encourage participation by using ice breakers and other activities
- Do an activity at the end, such as a quiz, to test knowledge
- Ensure topics and speakers involve all attendees



HOW TO IMPLEMENT INDUCTION

METHOD



Presentations: tips to avoid common errors

- Inspect all speaker slides, handouts, etc beforehand to ensure that:
 - they are laid out in a consistent manner
 - they are up to date
- A few days before the event, remind speakers and newcomers of date, time and place
- Have an activity or topic to fall back on in case a speaker is late
- Check all equipment and room layout the day before; don't leave it to the last minute
- Ensure the room is laid out in a way that encourages discussion - for example, horseshoe shape or round a table, not rows of seats
- Ensure all involved know how to use the equipment

HOW TO IMPLEMENT INDUCTION

METHOD



Pilot

Never take a newcomer through your induction process without first running a pilot scheme. This will allow you to check without embarrassment that:

- You have the right amount of information
- The delivery method is suitable
- There are no gaps
- The handouts, slides and other material are understandable
- Those involved know exactly what they are doing
- It works!



WHEN & WHERE INDUCTION SHOULD TAKE PLACE

WHEN & WHERE INDUCTION SHOULD TAKE PLACE



WHEN

Returning to Maslow's theories, you will remember that people have a hierarchy of needs and that they cannot move on to the next stage unless the previous need is satisfied. These needs can be used as a guide to what information should be given at what stage.

Before starting	where to go and what to do
First day	company and job information
Next few weeks	activities to establish relationships
Longer-term needs	feedback on objectives, training and development

WHEN & WHERE INDUCTION SHOULD TAKE PLACE

BEFORE STARTING



Induction starts the moment a person knows they have got the job. As soon as they have accepted, you want them to know how glad you are that they have accepted and how much you are looking forward to them working with you. So send a welcome letter as soon as possible as they may not start for a few weeks.

In the letter state:

- How pleased you are that they are joining you
- What time to arrive on the first day (usually later than normal hours)
- Where to go – reception location
- Who to ask for – whoever will be meeting and greeting them first
- What will take place on their first day (timetable of activities)



WHEN & WHERE INDUCTION SHOULD TAKE PLACE

BEFORE STARTING



Also indicate what you would like the newcomers to bring with them. This may include:

- P45
- Bank details

Some information about the company should also be sent, including:

- Details of benefits
- Organisational charts
- Job description
- Company brochure

This could be part of the welcome pack that you put together earlier.

WHEN & WHERE INDUCTION SHOULD TAKE PLACE



FIRST DAY

This is your chance to impress the newcomers and make them feel they have made the right decision. They should go home that evening with a smile on their faces, looking forward to the next day. You can do this by ensuring that you have planned exactly how they are going to spend their first day and making sure all those responsible have booked the time in their diaries.

Remember, the first impression is a lasting impression.

The standards you expect of your newcomers will be demonstrated by your actions, so always:

- B**e on time
- L**eave enough time
- A**void interruptions
- B**ook a room or take them out

WHEN & WHERE INDUCTION SHOULD TAKE PLACE

FIRST DAY - EXAMPLE



Start late, finish early and focus on basic needs.

Day 1

Time	Person/Activity
10.00	John Smith (line manager) - Welcome, establish rapport, go through job role
10.30	John Smith - Introduce to the team and buddy (10 minutes with each)
11.00	Tour of the building
11.30	Mary Little (HR administrator) - Check paperwork, go through company policy
12.00	Lunch with team
1.30	Team secretary - Sort out personal work area, stationery, books, IT password, etc
2.00	Give task to begin work on
4.00	John Smith - Feedback on the first day
4.30	Send home

WHEN & WHERE INDUCTION SHOULD TAKE PLACE

NEXT FEW WEEKS



The aim during the first few weeks is to ease the newcomers into their new roles and to enable them to become familiar with their manager and colleagues. Supply information and set tasks with this in mind. Newcomers may be expected to:

- Undergo training
- Spend time with colleagues they will be interacting with
- Find out more about the company by reading literature
- Set some work objectives with their line manager
- Develop the relationship with their manager through regular feedback meetings
- Visit different sites (if relevant)
- Go through health and safety issues
- Go through company policy
- Undertake work placements
- Shadow others doing the same job or one similar

Keep them busy. Do not leave newcomers doing nothing or they will feel left out.

WHEN & WHERE INDUCTION SHOULD TAKE PLACE



LONGER-TERM NEEDS

Once newcomers begin to settle in, they will be looking for information and activities that will enable them to perform their work at full speed as well as develop themselves. Once the formal induction process is over, there shouldn't be a sudden withdrawal of support.

Continue to give support by:

- Ensuring your behaviour and that of your team match the rules given to the newcomers
- Giving regular feedback
- Providing the newcomers with buddies, with whom they can meet to discuss progress, as an alternative to meeting their managers
- Encouraging contribution of ideas from newcomers who can often bring a fresh perspective
- Dealing with any problems at an early stage
- Reviewing performance after 1-3 months
- Setting clear objectives in line with individual and company goals

WHEN & WHERE INDUCTION SHOULD TAKE PLACE



WHERE

The place where you have your induction is entirely up to you. However, bear in mind that for:

One-to-one meetings

It is better to have a private room with no interruptions.

Group activities

It is usually better outside the office where everyone can concentrate on what they are there to do, with no interruptions. Consider hiring a room or going out for lunch.

Training

If you have training rooms then use these, otherwise book a room outside.

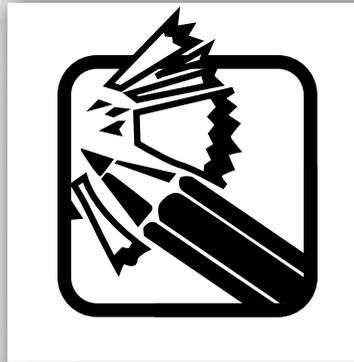
Work placement

The induction should be 'on the shop floor', where the activity actually takes place.

Always make a special effort in order to arrange for the induction activities to be held somewhere appropriate. Have a mixture of locations: the office as well as off site.

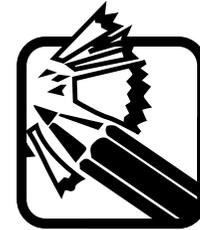
NOTES





EVALUATING YOUR INDUCTION

EVALUATING YOUR INDUCTION



WHY

If you are going to take the time and make the effort putting together an induction, you must take the time and make the effort evaluating it. The evaluation process starts with the pilot, at which point you should check the content, clarity of the information and the delivery.

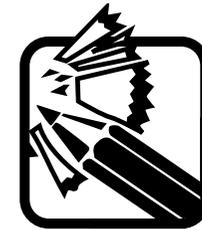
The evaluation of the actual induction should check that the newcomers:

- Have understood the company structure, products/services and clients
- Know what action to take in various situations (eg: fire, taking holidays, being appraised)
- Understand their roles and how these fit with the company aims
- Have received relevant training and are utilising this in their jobs
- Have met the appropriate people to assist them in their roles and in different situations

Go back to your objectives for having an induction and use these as a basis for your evaluation.

EVALUATING YOUR INDUCTION

HOW



There are several methods that can be used for evaluation and it is best to try more than one to get an accurate picture.

Questionnaires

These can be given to the newcomers once their induction is over. Suggested questions:

1. What were your expectations of the induction programme?
2. Were these met?
3. Did you feel you had your induction in time?
4. What did you find most useful?
5. What did you find least useful?
6. How would you rate the people involved in delivering your induction? (List all involved and get newcomers to grade them.)
7. What did you think of the location of your induction?
8. What did you think of the methods used? (List these and use a rating system.)

Emphasise that the questionnaires can be anonymous, so no one need be uncomfortable about expressing an honest opinion.

EVALUATING YOUR INDUCTION



HOW

Checklists for attendees

Use these to check how much the newcomer has understood and if there are any areas that need clarification. Indicate that the checklists are not designed to test the attendees but to gain feedback on whether or not there is anything more that can be done for their benefit. Checklists can include:

Meetings activities

What were these and what did you find out from each?

Health and safety

Where is the nearest exit to you?

Where is the assembly point?

What do you do if you discover a fire?

Company information

What is the main service that this company offers?

Who are the main customers?

What are the future aims of the company?

What is the function of your department?

EVALUATING YOUR INDUCTION

HOW



Checklists for contributors

All those involved in delivering the induction programme should have a checklist of what they are to cover. This serves two purposes:

- It ensures all newcomers are receiving consistent information, and
- It can detect if someone has missed an activity or piece of information

Some examples of checklists to use at different stages can be found in the next section.



EVALUATING YOUR INDUCTION

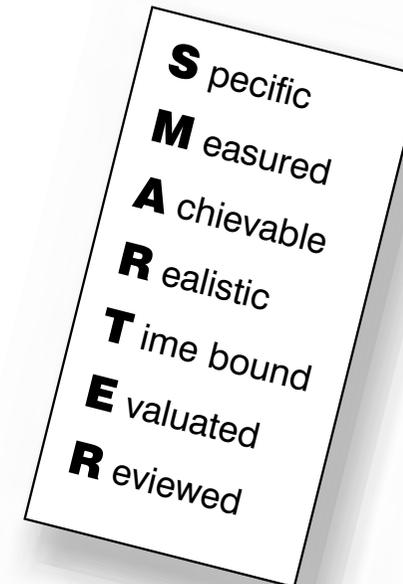
HOW



Line manager reports

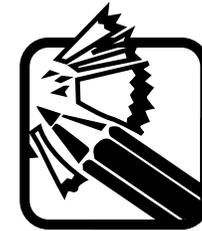
Part of the induction should involve the line manager setting some work objectives with the newcomer. These objectives must be **SMARTER**.

At the end of an agreed period the objectives should be reviewed by the manager and an assessment made of how the newcomer is integrating into his or her new job. This will highlight the benefits of the induction and any areas requiring further assistance.



EVALUATING YOUR INDUCTION

HOW



Line manager reports: example

Objective	How	By when	Comments on performance
To understand your role and the role of the department.	Read literature. Meetings with manager, meetings with department. Attend induction presentation.	End of April	Has demonstrated an understanding of her role by taking initiative on certain projects. Needs to be involved more in the team to understand other members' work.
To develop new database that is easier to use and consolidates old databases used by department.	Database training course. Meet database users. Offer choice of solutions. Pilot.	End of May	Has produced a new database now being used by team. To be reviewed in a month's time.
To update IT skills in line with company standard.	Go on relevant IT courses.	End of May	Has been on three courses and now using skills to produce work using company templates and style.

EVALUATING YOUR INDUCTION

HOW



Exit interviews

These are usually carried out to identify why a member of staff is leaving. Inadequate induction can sometimes be the cause.

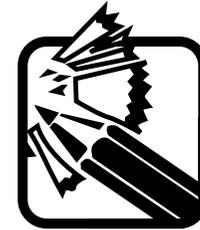
Tips for carrying out exit interviews:

- Carried out by someone who is neutral; not the line manager
- Information treated confidentially
- Questionnaire designed to be used for all staff
- Findings summarised and reported to management on a regular basis



EVALUATING YOUR INDUCTION

HOW



Exit interviews: example

1. What did you enjoy most about your job?
2. What did you not like about your job?
3. How would you rate your workload?
4. Did you receive adequate induction into your job?
5. Did you receive relevant training?
6. How would you rate your manager?
7. Why are you leaving?
8. What would you improve in the company if you could?

EVALUATING YOUR INDUCTION

WHAT TO DO WITH THE RESULTS



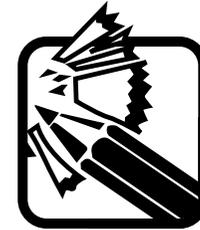
For evaluation to be of use, you must do something with the findings. Firstly, put the results into a report, summary or table so that it is easy to see the overall effect. This can then be used to:

- Provide feedback to senior management on a regular basis so that they are able to continue to support induction
- Improve content and delivery of the induction programme
- Identify any gaps
- Give feedback to those who have contributed to the induction programme

NB You can reassure those who have returned questionnaires that results are summarised, so the individual contents are never actually seen by the people they refer to.

EVALUATING YOUR INDUCTION

COMMON FEEDBACK



Here is some common feedback that you should be aware of when designing your induction:

- Too much information in one go
- Not given at the appropriate time
- Not all information is relevant to all newcomers
- Poor presenters
- Information out of date
- Website being updated
- Parts of the induction should have been arranged earlier



NOTES





INDUCTION CHECKLISTS

INDUCTION CHECKLISTS



The following are checklists for all the sections covered. You should go through these when designing and implementing your induction programme.

Why have an induction

Tick those that apply to your organisation:

(✓)

To inform about company product/service

To assimilate into the culture

To motivate newcomers

To increase productivity

To reduce staff turnover

To inform about policy and procedures

To involve and empower existing staff

To provide health and safety awareness

To meet colleagues

To understand market/customers

INDUCTION CHECKLISTS



Who to involve (in delivery)

Think about who would like to be involved and what they can contribute:

Title	Specialist skills/knowledge
Line manager	
Personnel function	
Representative from newcomer's team	
Newcomer's mentor	
A representative from senior management	
Anyone else	

INDUCTION CHECKLISTS



Who to involve (in receiving)

Don't leave out anyone. List all those people who joined, were transferred or promoted since last induction:

Name	Job title	Contract
		Return after maternity leave
		Work experience student
		College leaver
		Promotion

INDUCTION CHECKLISTS

WHAT TO INCLUDE



Preparation before first day

Tick items as you go through:



- | | |
|---|--------------------------|
| Welcome letter | <input type="checkbox"/> |
| Joining instructions | <input type="checkbox"/> |
| Job description | <input type="checkbox"/> |
| Organisational chart | <input type="checkbox"/> |
| Company brochure | <input type="checkbox"/> |
| List of what newcomer should bring | <input type="checkbox"/> |
| Organise IT - password | <input type="checkbox"/> |
| Desk, stationery, etc | <input type="checkbox"/> |
| Details of newcomer's induction programme | <input type="checkbox"/> |
| Inform all those involved | <input type="checkbox"/> |
| Welcome pack | <input type="checkbox"/> |

INDUCTION CHECKLISTS

WHAT TO INCLUDE



On the first day

This can be used to check that newcomers have received all of the information that they should have received:

Item	Person responsible	Date
Personnel		
Meeting at reception		
Checking details – bank, addresses		
P45 received		
Terms and conditions		
Explanation of induction procedure		
Security pass		

INDUCTION CHECKLISTS

WHAT TO INCLUDE



Item	Person responsible	Date
Line manager		
Introductions		
Go through job description		
Review department function and current projects		
Introduce to buddy		
Lunch		
Colleague		
Tour of office including:		
Toilets		
Exits and entrances		
First aid room		
Notice boards		
Car park		

INDUCTION CHECKLISTS

WHAT TO INCLUDE



Next few weeks

Item	Person responsible	Date
Set work objectives		
Go through training and development		
How performance is measured		
Health and safety procedures		
Company structure		
IT system		
Telephone system		
Trade unions/staff bodies		
Work placements		
Visits to various departments/sites		

INDUCTION CHECKLISTS

WHAT TO INCLUDE



Meetings and activities

Activity/meeting	Why	Contact name	Date

NOTES





CASE STUDY

CASE STUDY

BACKGROUND



LBC are book publishers with a head office in London and six branches round England. A few years ago they underwent a lot of changes which involved a reduction in staff numbers and a flattening of the management structure. They currently have one hundred staff and recruit mainly graduates.

Following these changes, it became evident that staff turnover was increasing and so management decided to do something to improve retention. From exit interviews it was found that a percentage of people were leaving after a year's service because the job had not turned out to be what they expected. It was decided that a new recruitment policy be introduced and, as part of this, new recruits were to have an induction programme.

CASE STUDY

OBJECTIVES



A team of six staff from different areas of the company was put together to help design and implement the induction. The first thing was to agree the objectives of the induction programme. This was done by using questionnaires and random interviews to find out what people wanted. From this, it was decided that the objectives should be:

- To give an understanding of the company, its function, aims, structure, products, markets and policies
- To give an understanding of the newcomer's job role and how it fits into the company as a whole
- To provide adequate training to enable the newcomer to do his or her job
- To boost morale of current staff and motivate newcomers

CASE STUDY

PROCEDURE



It was felt that a modular programme would be best in order to accommodate the different needs of graduates, non-graduates and those people who have been promoted and transferred.

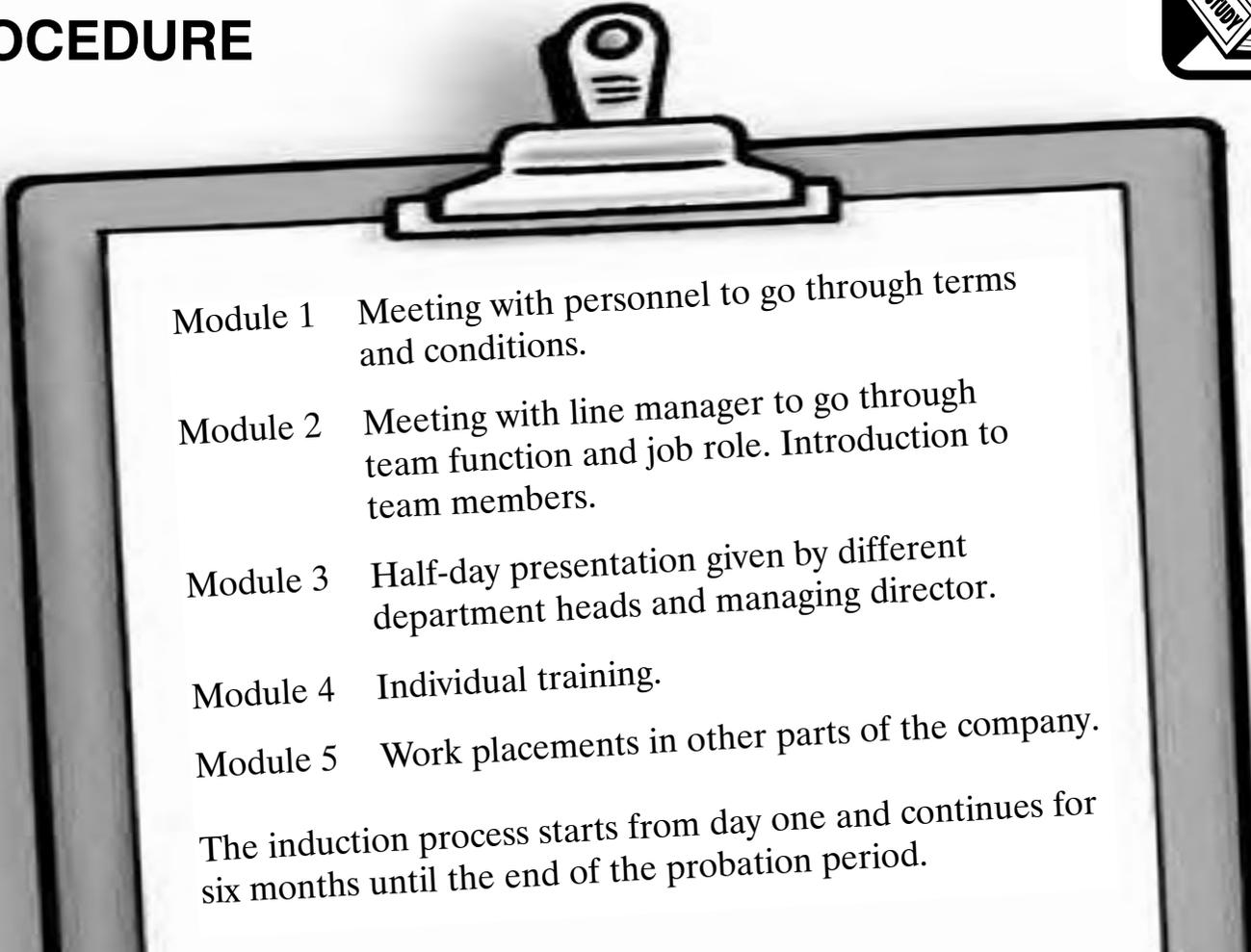
The programme required that arrangements be made in preparation for arrival of the newcomer. Items such as desk, phone, computer terminal, password and security pass were all organised beforehand.

Once all had been arranged, a welcome pack was to be sent to the newcomer. This would include company information, joining instructions and induction programme details.

CASE STUDY

PROCEDURE



- 
- A large illustration of a clipboard with a silver clip at the top, holding a white sheet of paper with text. The clipboard is centered on the page.
- Module 1 Meeting with personnel to go through terms and conditions.
 - Module 2 Meeting with line manager to go through team function and job role. Introduction to team members.
 - Module 3 Half-day presentation given by different department heads and managing director.
 - Module 4 Individual training.
 - Module 5 Work placements in other parts of the company.

The induction process starts from day one and continues for six months until the end of the probation period.

CASE STUDY

EVALUATION



The induction programme has been running for three years and the evaluation from the questionnaires and exit interviews has been very positive. The induction team continuously monitors the programme to check that it is not becoming stale. Changes that have been made include:

- Updating and development of pack material
- Introducing new methods of delivery
- Adding to the programme

The line managers feel much more comfortable now that new staff have a structured programme they can attend during those fragile first few weeks. Such a programme ensures newcomers are integrated with as much ease and support as possible.



SUMMARY

SUMMARY



Induction Team

- Gather some volunteers to assist in development and design
- Agree your **GAME** plan:
 - **G**oal
 - **A**udience
 - **M**edia
 - **E**xpression

Objectives

- Decide what the main objectives are. Include:
 - Company
 - Team
 - Individual
- Remember, the main aim is to **WIN**:
- **W**elcome
 - **I**ntegrate
 - **N**avigate

SUMMARY



Who

Decide who is to:

- Deliver
- Receive
- Train those delivering

What

Design a questionnaire to find out what people would have found useful.

Divide your findings into the four **Ps**:

- **P**lace
- **P**olicy
- **P**osition
- **P**eople

SUMMARY



How

- Decide on modular or continuous format
- Put together your company culture profile
- Use a choice of methods for delivery to suit different needs
- Run a pilot

When/where

- Using Maslow's theory as a guide, decide on what should be given when
- Remember **BLAB**:
 - **B**e on time
 - **L**ease enough time
 - **A**void interruptions
 - **B**ook room or restaurant

SUMMARY



Evaluation

Use several methods including:

- Questionnaires
- Manager reports
- Exit interviews
- Checklists

Ensure that you use your results to maintain and improve on your induction success.



RECOMMENDED READING

'A good start'

by Alan Fowler, published by IPD

'How to design and deliver induction training programmes',

by Michael Meighan, Kogan Page

'Induction'

by Patrick Burns, Industrial Society

'New Employee Induction',

by Charles Cadwell, Kogan Page

"When you are inspired by some great purpose, some extraordinary project, all your thoughts break their bonds. Your mind transcends limitations, your consciousness expands in every direction and you find yourself in a new great and wonderful world"

Patanjali

About the Author

Ruth Sangale BSc CIPD

Ruth is an HR consultant specialising in recruitment, people management and career development. Her work involves designing and delivering training workshops, researching and implementing personnel policy and advising on employment law.

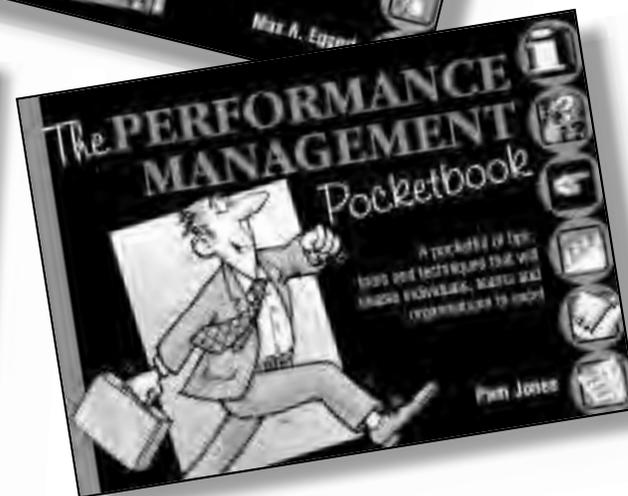
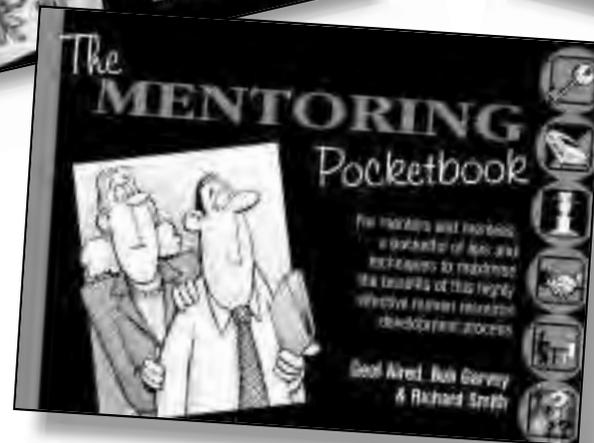
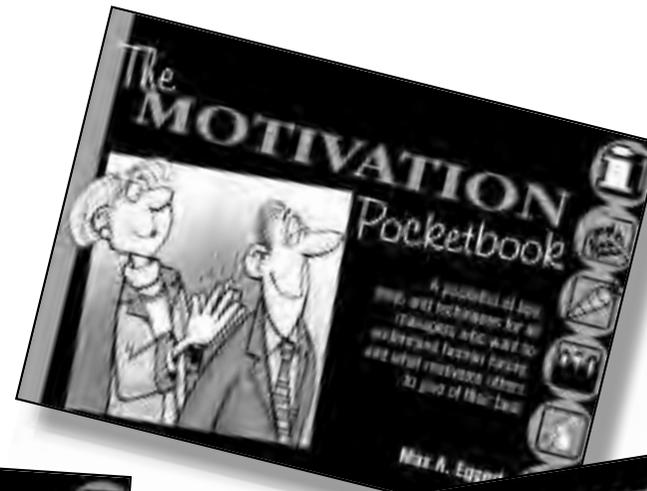
She enjoys enabling people to reach their full potential at work and believes that this is possible through providing an environment of support and challenge. In relation to this she also works as a career counsellor.

Prior to this Ruth worked as a Personnel and Training Officer at the Confederation of British Industry for five years.

Contact

Ruth works for Interpersonnel (HR) Ltd
Personnel Consultants
212 Piccadilly
London W1V 9LD
Telephone: 020 7917 6799
E-mail: interpersonnel@compuserve.com





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