



Best Practice Induction Plan Checklist



The objective of a good induction plan is to get new hires up to speed as quickly as possible, for their own benefit and that of the company. New employees want to get up to speed and start adding value as quickly as they can, for their own self-worth and job satisfaction. Management wants the same thing for economic reasons. The faster employees get up to speed, the sooner they earn their keep.

Traditionally, induction plans have been implemented for groups of people, but with remote working becoming more prevalent, it is harder to convene groups for the period of time involved. In fact, for remote workers induction can start whenever they join. They may have to wait for some group events, but a lot of what follows in this checklist can be delivered to individuals via e-learning, video, and web sessions.

The table below itemises the differences.

	Group Induction	Remote Worker Induction
	Welcome: start with a welcome message and a short presentation from the CEO or other senior executive. Content should include the company's value, vision, and mission.	Record the CEO or senior executive and tell the inductee to run the video (via your LMS or employee portal, so that running it can be verified).
	Office tour, introduction to key team members, and an overview of the company's organizational structure.	Can film a virtual office tour, introductions to key team members and include an overview presentation (as a separate content piece) of the organizational structure.
	Company policies and procedures: Educate new hires about policies and procedures, including code of conduct, ethics, key health and safety issues and practices, dress code, attendance policy, compliance procedures, and any other relevant rules.	Can build this information into an e-learning class, and have backup printed materials for both induction options. Advise new hires to download documents from an employee portal or from the LMS in order to be able to verify receipt.
	Training sessions: schedule training in core skills the employees may need depending on future role in the company. This may include products sold, services provided, sales techniques, customer service best practices and an overview of the supply chain and logistics.	Much of this can be accomplished in e-learning. Sales skills will benefit from role plays, which may be conducted over the Internet if the sales process is not too complex, but would be better face to face if it is.

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	Set initial goals and performance expectations for new hires for their initial months in the program. Issue these in writing and communicate them verbally.	Do the same with remote learners. Their goals can be communicated verbally over Zoom, MS Teams or similar and issued in writing. If you have an employee portal, record the issue in it.
	For graduate intakes and non-graduates onboarding at a similar level, assign a mentor to have periodic conversations with them and make them available to their mentees as needed for advice and guidance.	Do the same for remote workers, except that conversations will take place live over the Internet. Use email to confirm advice given in both cases.
	Departmental rotations: Facilitate rotations across headquarters departments and plan visits to stores (yours or your trade customers) and at least one warehouse. Multiple warehouses, if the new hires are expected to work in the supply chain and you have facilities with different roles, e.g. e-commerce verses store delivery.	Need to do this for remote workers too. Visits to stores and warehouses need to follow a plan with a guide to take them round. Advance requirements briefings should be given to the guides. Visits can be enhanced by giving the inductee an exercise to complete as part of the visit, for example, using the Martec store visit analysis checklist. Their mentor or manager can then review this with them after the visit. Warehouse visits are recommended to start at goods in and follow the flow of goods in their logical sequences, through the warehouse to despatch, and then cover the transport fleet and admin offices. Downloadable discovery questions from the Martec Retail and Consumer Goods Industry WIKI can be a good tool to help inductees maximize the learning benefit, by asking the guide or site manager smarter questions.
	Soft skills development: This can include communication skills, especially report writing and presentations, hosting web meetings, etc., team working, problem-solving, time management and office applications.	For remote workers some of this can be accomplished using e-learning. Other aspects can be addressed through live web meetings. More attention should be paid to the use of the web meeting tools. Presentation skills development is usually best accomplished through live classroom sessions. For remote workers consider training in work-life balance and working from home productively.

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	<p>Project work: the induction training plan should include some specific project assignments to be worked on at key stages in the program. For example, after a store visit, an exercise could involve visiting another company store and two leading competitors stores, and doing a comparison exercise to identify competitor strengths and weaknesses, and what really makes your company unique. This could involve asking shoppers questions during store visits.</p>	<p>Some initial online research could be helpful in a number of projects that might be devised, like a competitor analysis or a market sizing exercise, but fieldwork for things like competitor analysis will be essential.</p>
	<p>Industry knowledge: retail or consumer goods industry knowledge will be the single most important factor in getting new hires productive as quickly as possible. Because new hires in formal programs will often include graduates who could be posted into a variety of areas, a wide curriculum is important. Some companies do a limited version of this by inviting guest speakers and some managers to conduct individual sessions, but a comprehensively structured program will give better results. For either induction option, Martec's e-learning and associated tools in its Retail and Consumer Goods Industry WIKI will be invaluable education, but will also give the new hires the opportunity of appropriate education before they engage in project exercises.</p>	<p>In this case, the best option for remote workers is exactly the same as the best option for group intakes all in one place, namely to use Martec's e-learning. Our Fundamentals of Retail Suite or our Fundamentals of Consumer Goods Suite provide similar training covering:</p> <ul style="list-style-type: none"> • Industry overview and key trends • Typical organization structures, key executives, their challenges and KPIs they get measured by. • Analyzing KPIs to identify problems and opportunities. • Overview of the complete supply chain from field or raw material sourcing through to end consumers, and the interactions between the different parties in the chain. • Detailed introductions to key processes like store operations, buying and merchandising, e-commerce, omni-channel retailing, manufacturer direct to consumer operations, manufacturer sales and marketing operations, trade promotion management, etc. <p>Our off the shelf training can be enhanced by periodic live instructor web-based sessions to practice key skills and revise key learning points.</p> <p>Once it is clear, which functional area each new hire will be assigned to, they can be added to the roster for the recommended learning path most suited to their new role in the company, and start "learning in" for that role.</p>

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	Cultural integration: groups should be encouraged to participate in company events, team building activities, and social gatherings to help them build company identity and integrate into the company culture.	Remote workers need to do the same. One way of accomplishing this is to mandate that they spend a minimum two days a week in the office during their induction period. Another is to take a little longer, but “invite” them to attend key events face to face.
	Performance reviews: New hire induction should involve periodic reviews to assess their performance and identify any corrective steps that need to be taken to maximize their likely success rate.	This is exactly the same for remote workers except that interviews may take place online.
	Graduation: Celebrate successful completion of the induction program with an award style ceremony and each participant being presented with a certificate of achievement by a senior manager.	Remote workers can participate in Martec’s digital badge program and receive badges of achievement as they graduate each relevant class. Since they may be the only one graduating at that point, they could receive their certificate in the mail, but verbally announced by a senior manager via a live web meeting.
	<p>Other factors to consider:</p> <ul style="list-style-type: none"> • Face to face training allows for immediate feedback <p>New hires can more immediately ask questions and seek clarification. Remote workers will incur some, hopefully small, time delay.</p>	<p>Other factors:</p> <ul style="list-style-type: none"> • Simulation exercises will not work so well if the participants are remote, so if it is an important aspect of the induction training, they will need to travel for it. • Remote training provides more flexibility when new hires can be in different time zones. • Schedule regular virtual check-ins with managers and mentors. • Check the inductees working from home environment to ensure it is acceptable, both in terms of desking, seating, technology, etc., but also being able to separate work from family life. <p>Personalisation of remote worker training can be easier than with groups all working in one place. For example, additional classes can be added, or current classes removed from an individual person’s learning path for reasons like past work experience.</p>

As a side benefit of using Martec's industry training programs in your company's induction plan, you will end up half-way to achieving later challenges that you may wish to address, such as developing business acumen.

For more information on how Martec can help you with your induction program, please contact Brian Hume on +44 1823 333469 in the UK or +1 770 756 8231 in the US.

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