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ORIENTATION HANDBOOK FOR A CASE COMPANY

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This thesis was conducted to create a precise orientation handbook for customer service employees in a case company. The Orientation Handbook was made to help and support employees in getting uniform orientation. The purpose was to make sure that all employees get the same information, and nothing is forgotten from the orientation.

In the theoretical background, key aspects of orientation and customer service were defined together with employment issues. In the topic employment, parts of the Collective Agreement of the Service Union (TES) were handled as it is used in most of Finland’s commercial sector’s service employees’ contracts. The case company also uses the TES in their contracts. The case company’s orientation practices were compared with the found theory. Based on the findings of the theory, the base of the Orientation Handbook was created.

A small questionnaire was sent to the customer service employees of the case company, but the results didn’t bring new information to the creation of the Orientation Handbook. The Orientation Handbook was the compound of theoretical background, employee expertise and guidance of the case company’s supervisor. The thesis produced the Orientation Handbook with the checklist and an external Quick Guide that is meant for the easy usage of the operations at the cash register system. The Orientation Handbook contains thorough job survival guidance and tools for customer service employees of the case company to develop themselves as professionals.

The products will be handed over to the case company for inspection and possible development.
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1 INTRODUCTION

The object of this thesis is to produce an Orientation Handbook for the case company. The case company didn’t have an orientation handbook or any organized process for orientation. The purpose of the Orientation Handbook is to help and support new employees to act independently on the job fast. The Orientation Handbook can be used by the employees that have been on the company longer, to check information if there is something they are unsure of or don’t remember. When the Orientation Handbook is taken to use in the case company, it will be given for the whole personnel to read and act upon, in case there are actions that are not already used. The thesis is operational based work.

The topic came to be through discussions with the company’s supervisor of the thesis and the realization that there was a need for consistent orientation for all the employees. It was felt that there was a current need to have a consistent orientation as the company is growing, and it would be in the best interest to give the new employees the best starting point at the new job. With the supervisor it was discussed that the work was important, not only to the employees but also for the superiors. The case company has many stores around Finland where the level of independence varies. The superiors are working remotely which gives this project more value as the same practises help the whole organization.

The thesis will mainly be focusing on employee orientation and touching on the subject of customer service. The orientation handbook is meant for the employees working on the customer service sector of the case company. Customer service is the main aspect in the employee’s everyday work as it brings revenue and makes the business profitable.
2 BOUNDARIES AND CONCEPTUAL FRAMEWORK

One thing at the start and during the writing process of the thesis was setting the boundaries, not only with the school’s supervisor but with the case company’s supervisor. The boundaries with the case company were mostly of what could be said about them. The main restriction was that no sensitive company’s business plans or processes would get public.

![Conceptual framework diagram]

Figure 1. Conceptual framework.

In the Figure 1. the thesis product is visualized. The product and outcome of the thesis is the Orientation Handbook. The process starts from creating the theoretical background for Orientation together with Employment issues and Customer service. The knowledge and reference from the theoretical background is combined with author’s experience, thus creating the base for Orientation Handbook. Important topics and issues will be discussed with the case company’s supervisor to evaluate the needs of the Orientation Handbook. All information will be then combined to produce the product.
The thesis’s object is to produce an Orientation Handbook for the purpose of helping new employees get familiarized with the job and act independently on the job faster. To support the process and outcome of this thesis, research questions were made:

1. What will be the themes in the guidebook?
   a. How will these help the company?

2. What are the things new employees stumble most in?

3. How will the company benefit from employees that do their job well from the start?

3  THE CASE COMPANY INTRODUCTION

*The case company*

The link to the case company is that the author has been working there since 2016, when they opened a new store in Turku, among other cities in Finland. This day, there are 6 stores in Finland. There is a lot of trust from the managerial level to the customer service employees to survive in everyday situations independently. The case company has obtained more staff for their stores since the year 2016, and the author has been involved in the orientation processes of 6 new employees.

The case company is an international growing business in retail and is an importer of consumer goods. Most of the personnel are working in the commerce and customer service sector. As the company is a growing business in their own industry, they are still searching and developing their operational models. That is also the reason why the case company suggested this topic. There hasn’t been a uniform way for their operations concerning orienting new employees to the job.
In the normal working hours store employees have 2-3 main shifts, those being morning shift, middle shift and evening shift. The number of employees vary depending on the size of the store and the opening hours.

The current orientation in the case company happens by appointing the new employee to work in the same shift as an older employee of the store. The new employees usually start by having their first day in the morning shift, where the older employee shows them what to do. The issue is that there are no manuals or lists of the operations that the older employee must teach the new employee. The risk is that something very important will be left out of the orientation. The left-out information usually will later come up in forms of mistakes and misunderstandings.

To clarify the above information, the case company has a need to create company instructions and guidelines to have their customer service employees follow company policies independently. For this to happen, the instructions need to be same in every store and the same information must be available for all employees. Best way to implement is to teach the new employees with the created Orientation Handbook and have the older employees embody the information from the Orientation Handbook.

**Quick Guide**

For this part, the case company’s supervisor gave very specific instructions. It was wanted that this part would consist of important parts for the smooth flow of cash register operations. The quick guide would be an external booklet that would be kept near the cash desk, always. It is a learning element for the new employees and will be supporting older employees in case some actions are forgotten. The quick guide would consist of basic core actions, and of more rarely happening actions that are easily forgotten. The basic actions parts were the morning and evening operations, product change and returns. In addition, the rarer actions, gift cards, special cash register situations and tax-free services.
4 ORIENTATION FOR SERVICE EMPLOYEES

4.1 Orientation

Orientation definition is by Österberg (2005, 90) all acts that lead to the new employee to be part of the organization, work community and being able to do their job tasks. The person in charge of orientation is the manager or recruiter but the task can be passed on to a “suitable person”, meaning for example a colleague of the new employee. (Kupias & Peltola 2009, 36; Hokkanen, Mäkelä & Taatila 2008, 63.)

To give other perspective, Kupias & Peltola (2009, 67) argue that it is important for the new employee to get to know the superior in the first weeks of employment to create trust. It is good for a new employee to see if the values of the company correspond to their own values.

In the author’s experience, it is more than the case nowadays that the supervisor chooses a “suitable person” to orientate the new employee. They might have a ready-made unofficial checklist, which they will go through point by point. In the case company the practice of orientation has been that the store manager either orientates the new employee or appoints a colleague of the new employee to orientate them while working. The benefits of colleague orientating the new employee are that they are always present, and the new environment can seem more relaxed when the new employee is made part of the working community. (Österberg 2005,90; Kupias & Peltola 2009,67.)
4.2 Orientation process

In the Picture 1 is shown that the orientation process by Hokkanen, Mäkelä & Taatila (2008, 64) can be divided into four categories: “Time before starting at work, First day, First week and First 3 months.” It was felt that this process was a good example to divide the orientation concept. The handling of the orientation theory will be divided into these 4 categories. Upcoming theories will be discussed inside this theory division from Hokkanen, Mäkelä & Taatila (2008, 64).

**Before starting**

This is the time that the manager or superior of the company has already chosen the perfect fit for the job and the next step is to sign the contract and that the new employee starts working. There are a few things for the management to do and prepare before the new employee can start working.

For the time before starting at work the orientation is mainly done by the superior. the superior is preparing for the new employee to start, such as making the contract of employment and reserving user rights for passage and programs. It is also good to
inform the person who will be orientating the new employee so that they can make preparations for the day. (Hokkanen, Mäkelä & Taatila 2008, 64.)

It is also a great time to wonder and question if the organizations procedures are still valid and up to date. Meaning that this is the best opportunity to see them from other’s perspective, could something be changed. Or if it is wished to even want to teach these things to the new employee. (Kupias & Peltola 2009, 77.)

In the case company, the store manager will have made the selection of the new employee from those interviewed. There they have already given the new employee some information about the company. Before the new employee comes to work, the store manager will make the contract ready, prepare working outfit, nametag and passage rights for them. The manager also has to take care of adding the new employee to the payroll, insurances and such.

**First day**

For the first day the authors recommend starting with meeting of the superior, who explains the employees’ responsibilities and objectives. On the first day, it would be important to go through with the employee how the orientation will progress, look through the environment and let the employee know the closest coworkers. “At the end of the first day the employee should know what they should do the next day they come to work and how they can get to work”. (Hokkanen, Mäkelä & Taatila, 2009, 65.)

The new employee is usually very nervous and anxious on their first day. It is important that the orienting employee, be it manager or trusted employee, makes the new employee feel welcomed. To reduce the new employee’s nervousness and anxiety, it is good to use a friendly approach and make them fit in. This will in a best-case scenario result in a long-term relationship. (Cadwell & Crisp 1988, 18.)

In the case company, usually the new employees are the first 1-3 times working at different shifts such as morning, middle and evening. During this time, they have a mentor that will teach, observe and guide them to be able to survive alone.
In the case company, it is also very important that the employees’ personalities match well together. They will be working very closely in a team and good communication is a must. Also, by introducing the communication canals and creating an open environment for new employee is vital. This is for the new employee to feel that help is always available if they are left alone.

**First week**

On the first week it is good to get the new employee to familiarize with their job tasks, company processes and end products or services. The orientation continues with repeating the learned and with the new employee confirming the learned information. (Österberg 2009, 96.)

Best way for the employee to get familiarized is by doing the work. By letting the new employee do the work, is one of the most efficient ways to learn. (Cadwell & Crisp 1988, 48.)

The employee will be taught about the job’s safety issues, how they can do their part and what are their responsibilities (Helsilä, 160-161).

In the case company, after 1-3 days the new employee will be doing the work independently. The person orienting, or the appointed mentor will have evaluated the new employee if they can survive the morning or evening shift without face-to-face guidance. Then they are alone and will contact store manager, superior or another store if they have a situation they don’t know how to handle. When they are left alone, they have the time to study the company materials and the products. In the case company the orientation responsibility shifts to the new employee as the company expects them to take more initiative role.

**First 3 months**

When the employee has been working for a while, it is a good custom to hold a final discussion about their feelings and ideas about the work and the organization. This
creates a bond of trust to the new employee. (Valvisto 2005, 50.) This same opinion can also be found in other sources about orientation process. For example, Österberg (2005, 97) and Työturvallisuuskeskus (2013, 6). In the book by Valvisto (2005, 50), the author is saying that new employees have usually at the end of probationary period of employment, experienced if there is something “wrong” or peculiar about the operations.

The responsibility of the orientation has been on the superior through all these 4 phases. At the time before the start of working, the responsibility to make preparations for the new employee were on the superior. From there if he/she so decide, appoint a suitable person to do the orientation. The appointed person (mentor) or the superior will then start the orientation of the new employee to the job and will all the way supervise the process. After the first day the new employee gets more responsibility as they learn more. When the new employee has been in the company for a while, it is recommended to hold a final discussion with them. (Hokkanen, Mäkelä & Taatila 2008, 64-65; Österberg 2009, 96; Cadwell & Crisp 1988, 48; Valvisto 2005, 50; Työturvallisuuskeskus 2013, 6.)

In the case company the responsibility of orientation is also with the store manager. But usually the manager gives the responsibility of the practical orientation to an employee who happens to be in the morning/evening shift and can be trusted with the job. After a few shifts the new employee is usually already able to work independently and the responsibility of the orientation shifts to the new employee. It is expected that they are spontaneous and will find out about issues themselves. If it is noticed that the new employee is not able to perform the core job tasks, they will be appointed with more orientation.
4.3 Orientation content

Picture 2. 5 Steps methods from the Centre of Occupational Safety (Työturvallisuuskeskus 2013, 2).

The 5 steps method for orientation was found from the Website for The Centre of Occupational Safety. As seen in the Picture 2, the 5 steps are: “Preparations, Teaching, Imaginary Practice, Experimenting and practicing, Securing the learned.”. This method is presenting the steps that how the employer can implement the orientation. (Työturvallisuuskeskus 2013, 2.)

The first step is preparations. In this step it is suggested to arouse the new employee’s interest in the job and company. Then evaluate the know-how of the new employee and explain the job. Also, an important factor is to create the steps that the new employee will be able to follow when explaining the orientation plan. (Työturvallisuuskeskus 2013, 2.)

Second step is teaching. In this step the mentor attempts to explain why the job is done the way it is while at the same time showing what to do. They are teaching the relative factors that affect the job and explain the rules. (Työturvallisuuskeskus 2013, 2.)

On the third step is imaginary practice. It is time for the employee to repeat what the mentor has instructed. This step is right before step four where the employee can practice and experiment the job. The employee practices over and over again with the mentor present to correct the mistakes. (Työturvallisuuskeskus 2013, 2.)
Then on the fifth step it is, securing the learned information. At this step the mentor and the supervisor will evaluate the new employee. Their competence and skills to work are evaluated to being able to give appropriate feedback. This is also a time for the employee to give feedback with thought about their orientation process. If the employee needs more instructions or orientation, it is to be done. If the employee is ready to work independently, then the orientation period will be finished. (Työturvallisuuskeskus 2013, 2.)

Many things affect the way the new employees should be orientated. Depending on their previous experience, it might take more time to orientate a person for their first job than a person who has been in work life for years (Österberg 2005, 91). This difference has also been seen with the case company. For example, in the case company there was a new employee that was not new to the field, her questions in the orientation period didn’t involve the word why. She already knew why, she just needed to be oriented to the ways of the company. Although it is still better to do it thoroughly, to avoid possible future mistakes.

4.4 Service Union’s Collective Agreement (TES)

For a new employee that has not been in the working life for long, it is a good thing to go over company policies and the employee regulations. In the case company’s field of customer service, they are using the Service Union’s commercial sector’s collective agreement, in short TES.

The following text has been taken directly from the PAM’s website (2018):
“PAM negotiates collective agreements for Commercial Sector. Collective agreement specifies the minimum terms and conditions of employment such as wages, working time, sick leave, annual leave, wages for the holiday period and holiday bonuses. For example, wages should not fall below the minimum wages negotiated by PAM in the collective agreement. It is good to keep in mind that you cannot conclude an individual employment contract on weaker terms and conditions than those agreed upon in the collective agreement.” (Website of PAM 2018.)
The case company is using commercial sector’s collective agreement. These agreements have been updated in April 2018 due to the competitiveness pact between the government of Finland and the service sector’s lobbying organization, PAM. In these agreements it is good to be up to date. Not only by the employer but also the employee should know if their contract changes.

Below can be found miscellaneous topics from the Collective Agreement of the Service Union. Topics such as work time, absences (sick-leave) and regulation on orientation are briefly introduced. The topics weren’t fully covered as they are in the TES. The TES is very comprehensive and has divisions for different employees in the commercial sector. Parts relative to the outcome of the Orientation Handbook were handled.

**Work time**

In the employees’ employment contract is stated the minimum workhours per week. Employer will keep track of the workhours of employees working less than 37,5 hours per week. The workhours should be reviewed in cycles of 6 months. Cases where the review cycles exceed 6 months but are less than 1 year, should be agreed upon according to the article 23§ of the employment laws. Employee must have uninterrupted resting time of 11 hours during a 24-hour period after the start of the shift. (Collective agreement for the Commercial sector 2018 section 6)

In the working time schedule by the employer, is marked the starting and ending of the work shift, resting time and the average time left per day at the workhour cycle. Employees can make suggestions to their shifts and days off and to when they wish to use their annual leave. The working time schedule must be given to the employees 2 weeks before the start of the working week of the schedule. If agreed with the employees, then the schedule can be given 1 week before the start of the working week. (Collective agreement for the Commercial sector 2018 section 6)
**Absences**

Employee can get paid if they are unable to do their job due to sickness or accident. That is, if they didn’t intentionally cause it by grossly neglecting their health. Employee is obligated to inform about their sick-leave immediately. If the employer requires proof of absence, the employee is obligated to provide it. This can be for example a medical certificate or another employer approved statement. The medical certificate must be primarily by occupational health doctor or from another employer specifies doctor. (Collective agreement for the Commercial sector 2018 section 16)

In companies that have adapted the self-declaration procedure before 1.2.2017, sick-leaves of no more than 3 days can be settled with the employer. This means that employee can get agreed absence without medical certificate for short term sickness for example, flu or diarrhea. In this situation also, the employee is obligated to inform about their condition and absence immediately. The employer decides if they give 3 days’ absence without medical certificate or if they will not. (Collective agreement for the Commercial sector 2018 section 16)

**Orientation**

The person orienting the new employees, trainees or students completing professional degree must be beforehand determined and must have job-related competence. Enough time must be reserved to the person orienting for completing the orientation. (Collective agreement for the Commercial sector 2018 section 25)

5  **CUSTOMER SERVICE**

5.1  **General on customer service**

In this chapter the focus is on the general concepts of customer service. More deeper definition of practical situations is found in the topic Feedback. For example, how feedback is handled and how to react to angry customers. The concept of customer
service and feedback were important factors to handle for the Orientation Handbook. As Jokinen & Inkiläinen (2015, 3) state, customer service is not a personality trait, it is learned.

Customer service is used widely. It is used in for example insurance companies, libraries and hospitals (Jokinen & Inkiläinen 2015, 2-3). It is in other words, companies’ interaction with the parties involved in making and use of the end product or service. Most commonly seen customer service is probably when companies have employees sell their goods to consumers.” The essential factor for the company’s operations is a buying and paying customer” (Aarnikoivu 2005, 13).

The customer service business has changed over the decades. The requirements in the job have changed from being present to knowing your customers, knowing the field of business and being multilingual. In the beginning the work is very repetitive but motivated employees that can handle any situation are usually highly valued and will advance in their careers’. In customer service, the right mind set and developed expertise can turn a tough situation into an advantage. (Jokinen & Inkiläinen 2015, 2.)

When the company can show that they value the customer, it creates value to both parties, company and the customer. Aarnikoivu (2005,13) is right, there is no business if there are no customers. Nowadays it is more the case that customer service can be seen as part of the sold goods. Companies don’t only sell products; the customers also buy the brand or service.

It is more beneficial to have loyal customers that come back for the services or products that you offer than having to find new customers all the time (Gerson 1998, 3). To aim at good customer service, it is rewarding. For example, making a successful business, having a secured job and having positive feedback on operations. (Newby 2000, 7.)

“Good customer service is not a smile campaign!” (Newman 2000, 24). Newman is saying that it is not enough for the customer service employee to be nice and a friendly to the customer, but it also requires quick thinking and adaption to constantly changing circumstances.
5.2 Feedback

According to Gerson (1998, 8) 4 in 100 customers complain. Those customers that never give any feedback but have felt issues in the company’s operations might think that it is too much work, and nothing will change. Even if they don’t complain straight to the company, they might tell their bad experience to people they know. Those complaints might get exaggerated and altered when bad experience travels word by mouth. The worst result can be that these might end up published, where it can quickly reach the whole world. (Newby T. 2000, 11.)

Reasons for a company to have complaints about service depends on how the customers perceive it. Reasons for negative perception might come from the employees in the customer service. If the customer is feeling unwelcomed and senses that the employee is being indifferent, are most likely to lead to the customer getting a bad image about the company. (Gerson 1998, 11.)

Not only employees make mistakes with their front-line reactions, but negative feedback might also come from the way that the customer feels about the company’s products. If the company has branded themselves as quality service and products, then the standards of what the customer has might be higher than what the company’s real quality standards are. (Gerson 1998, 11.)

Handling these negative feedbacks and complaints are sometimes tricky. It is better to solve the problems than pass it on to someone else. When solving the issue, one should not argue about the complaint. Better is to admit it and together come to a solution. The employee should not make promises that cannot be kept or pass the blame. (Newby 2000, 47-48.)

Most of the customers never give any feedback and according to author’s experiences, positive even less than negative. It is important to thank and honor the customer for
giving constructive and good feedback, even if they had an issue with something. But most important in author’s opinion is to practice in case of very angry customers. The customer service employees’ reactions and words matter on how the situation will turn out. If customer comes ready to shout and fight, you need to surprise them by giving them an easy way out: resolving the problem on their benefit.

Picture 3. Making Complaints into Benefit. (Newby 2000, 40.)

Newby states that customer complaints can be beneficial for the company. Through them the company can make adjustments to develop their services and quality. In the Picture 3. Newby has gathered these 5 operations for company to fix the source of complaint, that no one will complain about the same issue again. If the problem is in the product, erase the products with the same mistake. Same action with the company’s operation and service, adjust them to meet the expectations of the customers, or at least if possible, try to develop the operations or service into a satisfactory solution. It might be that the problem is that, actions such as making more effective service guides and implementing more customer oriented leading, are essential solutions. (Newby 2000, 40.)
6 THE PROCESS OF MAKING AN ORIENTATION HANDBOOK

6.1 Topics to be covered in the Orientation Handbook

Helsilä (2009, 48) states that at least these subjects need to be covered in orientation:

1. Company introduction
2. Working environment introduction
3. Work introduction

In the first subject “Company introduction”, the emphasis is on the company ways, policies, ideas, visions and so on. Most of this will usually come in the recruitment process and interview. More in depth information is given on the first day and most likely the employee is required to read the company documents. (Helsilä 2009, 48.)

In the working environment introduction, the new employee gets to know the colleagues, facility members and clients/customers involved in the everyday working situations. It is important to get to know the people that might be able to help you with arising questions. Usually the most important contact information of these people is also written in a company handbook. (Helsilä 2009, 48.)

Then the operational part, the work introduction. In this the person orienting the new employee will go through what is expected of him or her and what are their responsibilities. Written pamphlets can be read at the first week or so, but the introduction to the company ways and to the job is good to do face to face. (Helsilä 2009, 48.)

6.2 Process

In the process it was clear that the first step was, that the topics that would be discussed in the Orientation Handbook needed to be chosen. At first it was the idea to make a questionnaire for the customer service employees to find out their thoughts on the orientation period. Discussions about the issues related to the Orientation Handbook were usually handled with the company supervisor by phone calls, but it was felt that there
was a need for a face-to-face discussion to determine the main topics that should be in the Orientation Handbook. The meeting with the company supervisor and the questionnaire are gone through later on this thesis.

The topics and content ideas that were gathered from the meeting with the company supervisor were grouped by themes such as safety, communication and operations. Then the themes’ contents were written with the author’s professional experience from the case company and with the theory parts of the thesis. The checklist is heavily based on the theory of the orientation, that was handled in the thesis.

The core of the Orientation Handbook is following the theory by Helsilä (2009, 48) stated before. Helsilä stated that 3 subjects should be in the orientation: company introduction, working environment introduction and work introduction. Those three subjects were taken into account when making the Orientation Handbook. First in the Orientation Handbook are the contact information and the company introduction. Working environment is left to the person orienting (mentor) to go through with the orientation checklist. Work introduction is the combination of the Orientation Handbook, Quick Guide and the orientation the new employee receives from the mentor. (Helsilä 2009, 48.)

The practical insights of the orientation come from the author’s orientation experience of 2 years. The practical insights were seen relevant as it is not always easy to remember or understand, why the new employee didn’t understand the task or the reason behind the task.

The purpose of the Orientation Handbook is not to orientate as it is. It is supporting the orientation, as it happens face to face. Employees that are orienting new employees, can implement the orientation process as they see fit. The Orientation Handbook will act as a basis, making sure that all new and old employees get the same information and that important aspects related to the job are handled.
6.3 Meeting on topics 27.9.2018

As said before, the topic for this thesis came from discussions with the company representative. The initiative to get a thesis topic from the case company came from the thesis author. Needs were discussed, and the topic Orientation Handbook was chosen. The company supervisor stated that a quick guide to cash register actions as external part of the Orientation Handbook could be implemented. The language of the Orientation Handbook was agreed to be Finnish.

The most important meeting about the contents of the Orientation Handbook was held 27.9.2018 with the company supervisor. For this meeting a draft of the checklist and Orientation Handbook layout were created, based on the theoretical background handled in the thesis, together with core job operations information. Theories of Helsilä, Hokkanen, Mäkelä & Taatila and the 5 steps method from Työturvallisuuskeskus (2013, 2) were the most influencing topics when creating the base. Theories were opened in previous parts of the thesis, so they won’t be defined in this part anymore.

The preliminary checklist consisted of two lists based on the theory. Together they created the checklist that can be found in the thesis Appendix 1. First list of things to be covered during the first days at the work. This list included subjects; company history, a tour around the workplace, safety, work description, working hours, pay, clothing, probation period, vacation, sick leaves & health services and cash register. The second list was about subjects that should be looked and explained when familiarizing the workplace. In short, the tour around the workplace. Those subjects were; the cash desk, staff routes and how to use them, different departments, recycling, staff rooms and the exits.

In the meeting the basic job description tasks were defined with work expectations of the employees. Core job tasks were agreed and experiences from where most employee mistakes come from. One thought was adding communication to the topics. It was felt that communication is a key factor in working in a team. Good communication skills don’t come naturally for all people. By this meaning that not everyone knows, who to contact or they don’t tell important information forward. The meeting brought content ideas and more specific ideas to what to define in the Orientation Handbook.
6.4 Questionnaire for store employees

A questionnaire was conducted for the store employees to find out what they had felt that was difficult when starting the job. Questions were open ended and it was conducted in Finnish. The questionnaire can be found on thesis Appendix 2. The questionnaire was sent to all stores’ emails with a cover letter. The given time for answers was quite short, only 7 days. In the first 3 days no replies came, so one of the store managers was asked to make a statement, that the questionnaire was meant for the employees and that it was a chance to influence the future.

Seven answers were received from the questionnaire after the store manager’s email, of which only two employees answered to all questions. No significant new information was received from the results that could have been included into the Orientation Handbook or the Quick Guide. In the results, employees found learning of the cash system difficult or parts of it. The parts mentioned in the questionnaire were parts that the case company already specified to be put into the Quick Guide. The importance of the questionnaire was questioned, and the author came to a judgement that it would have no significant meaning even if conducted again. It would be more efficient to first implement the Orientation Handbook and if employees notice missing information, then include it.

7 ORIENTATION HANDBOOK

The Orientation Handbook is a combination of the subjects gathered from the company supervisor, company policies, employment issues, company’s website and author’s own experience as a professional employee at the case company. The Orientation Handbook is confidential case company document therefore it will not be published completely in this thesis. For the purpose of this thesis, the subjects handled in the Orientation Handbook will be explained.
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Picture 4 of the translated table of contents of the Orientation Handbook for the case company

Above is the Picture 4 of the Table of Contents of the Orientation Handbook. It was translated from Finnish to English for better understanding of this thesis. The page numbering has been removed from the picture to avoid confusion that the handbook would be a finished product. Orientation Handbook will be sent to store managers for critical discussion about the contents. Contents may still change, and some subjects may need more deeper definitions.

Contents are explained in the subheadings below. The subheadings are the reflection of the Picture 4 of the table of content of the Orientation Handbook.
7.1 Contact Information

On the first page of the Orientation Handbook it was necessary to display all important contact information. There are listed the email addresses and phone numbers of every store, store managers, superiors, IT help and other partners. The document will be left open for every store to also add their own important contacts for example security. All managers’ titles are also named as it might not be clear for all employees, who they are.

7.2 Introduction

The case company has been operating in their specific field of business for over 20 years. The information about their brand and operation model is explained in more detail. For this thesis the information was left out as it would reveal the company’s identity and important information about it.

The second thing defined is the purpose of the Orientation Handbook. It is written for the employees and for the future employees to have uniform working rules. It is desired that when the document is taken to use, it would be carefully read and acted upon. The things written are direct rules and acts of the company that should already be in use in every store, and if there is something that is not implemented the way it is written in the Orientation Handbook, it is to be corrected as soon as possible.

The first thing that employees can do when taking the document to use is that they would rearrange/clean the working environment in a way that it is easy for everyone to find the working tools. All unnecessary things should be thrown away and the store email cleaned and organized in a logical way.
7.3 General

**General rules**

Under this heading in the Orientation Handbook, information about outer appearance to customers, such as how to behave at the cash point, is explained. For example, at the cash point the employees can’t eat or have their mobile phone with them but can keep for example a water bottle near. Employees are required to take care of their health and appearances as they are the representatives of the company. Issues such as doctor’s call or children can be arranged according to the situation.

**Safety**

Safety part handles issues from email security to physical safety at the job. For example, employees should never open email attachments or links from unknown sources. Attention should be paid to the sender, proper grammar and to the links. In case employee doesn’t know how to proceed, they should contact store manager or superior. In stores the employee must mind customers and not leave dangerous objects such as scissors or knives available. Own safety and health is also important to note. If there are heavy objects that need moving, it is always safer to get help. There is an existing safety regulations booklet that the employees need to read by heart.

**Occupational healthcare**

In this part in the Orientation Handbook the healthcare issues are handled. There are procedures when in case of sickness. The most important point is that employees needs to always call their store manager, who can give up to 3 days sick leave without medical certificate. This is a recommendation from the collective agreement of the service union, that the case company is using, to avoid overload situations for the municipal healthcare during seasonal epidemies. In other cases, medical certificates are needed. The case company has a contract with an occupational healthcare provider. Employees must read the contract on what the healthcare company is providing and what not.
7.4 Work Description

This part handles most of the employee’s responsibilities. What is their job description, what it means in practice and outcome expectations. Employees are encouraged to use their common sense, and if there is something they are not sure of or want to confirm their methods, they can always approach their colleague or superior. Emphasis on this chapter is in the spontaneity. The employees should always contact help when they are not sure.

Another important factor addressed in this topic is making mistakes. When work is not done properly the first time, it wastes valuable working time and resources. Making mistakes should not be feared as everyone makes them sometimes. Employees should still take responsibility over their actions and admit them. Mistakes are to be learned from, and the situation is good to be gone through to keep the working environment open. In case of mistake employee should contact superior or store manager for help. Always when noticing an error or other grievance, employees should notify their superior.

Work clothing

This part is very specific on what is the employee’s outfit and why. Work clothes should be clean and the appearance neat. Detailed information was left out of this thesis for the privacy of the case company.

Working hours

The information is based on employment laws that were handled in the theory. In different stores there are different shifts division depending on the opening hours. Most important shifts are morning and evening shifts as there are different needs for attention in the operations. In the morning shift employee needs to open the store, calculate the base cash amount and get the cash system ready for business. Then catch up with the latest information related to work and finish any unfinished tasks. In the evening shift employee takes care that the store is ready for next morning, sees the last customers out before calculating the cash and securing the cash accordingly.
**Products**

Products come from own importer and from other distributors.

![Diagram of product distribution chain](image)

Picture 5 of basic product distribution chain. Orientation Handbook.

In the above Picture 5, there is visualized the basic product distribution chain. The distribution chain is taken into the Orientation Handbook to give the employees insight about where the products come from. There are many manufacturers, but the basic product distribution chain starts from the manufacturer, goes to the hands of the distributor, who then delivers it to the store. Employees must know where the most important products come from, that being the store’s own importer. Those products will be appointed to the best places in the store.

From the products employees need to find out their manufacturer, importer or distributor and other necessary information. When employee understand the background and operations of the product, it is easier to sell and help customers fill their needs. Employees need to possess skills and show expertise in their line of work.

Employee should take the initiative and learn where the products come from. Customers are also very curious of the products origins and materials used nowadays, so it is important to be able to have that knowledge. It is emphasized that the employee should be proactive about the field of business and learn the products themselves. In this part it is also determined what to do with products that are not in their best shape and how to correctly inform the price, but that information will be left out of this thesis as it is company information.
Cargo

Cargo defines what to do when the shipment comes to store. There are different procedures that need attention depending on the shipment, mainly on the shipments that are from the case company’s own distributor. It is also defined how it should be handled and what to do when facing deviation from the invoice. All information should be exactly as stated and if not careful, wrong information could be saved into the system and when checking the inventory, there will be more work and stock to correct.

7.5 Store

Under this topic all things related to stores are gathered. The working environment consisting of the store, storage rooms, warehouse and cash point must be kept in good shape and organized. In the store there is no such thing as nothing to do. The employees should coordinate with the store and warehouse and notify the store manager when running out of goods or tools. Customers may suggest products to be included to the selection, those should be listed and sent to store manager.

Store visual outlook issues will be left out of this thesis for the privacy of the case company. Stores have televisions for ads, but the instruction were left out of the Orientation Handbook as it is too simple to use that it needs to be covered in the work.

7.6 Customer service

On customer service, it is emphasized on how important the employee’s own appearance is to customer. Special manners and policies are left out of the thesis for the privacy of the case company.

As stated in the theory before, most of the feedback is negative and, in those moments,, it is good to remember that the negative feedback should not be taken personally. Feedback and complaints should be cleared. Feedback should always be gone through with the whole staff to recognize what went wrong, or right.
7.7 Communication

Communication was chosen as its own topic as it is very crucial in an environment where employees are left alone to manage without the presence of the superior. All stores have a phone to use quite freely. By calling the superior or store manager is faster than sending messages or emails. It also eliminates the possibility of wrong interpretation.

It is also good manners to be polite when talking to colleagues on phone. The same instruction is applied with all other calls. If there is a moment where employee can’t answer the phone for example talking with customer, it is expected to call back later. Store phone is very important communication tool and is expected to be with the employees at all times. In the evening it is left to the store to charge.

All stores have message application in the store phones and groups, for example inspiration on how products are organized in the stores. Here it is reminded to employees that even though there are group discussions and pictures are taken frequently, it is not an excuse to chat with colleagues on silent moments. Although this being part of the job, one should think about how they appear to the customers. Customers might not understand that the phone is for work but see it as loitering.

7.8 Return Policies

In this thesis the information about the return policies is left out as it is sensitive company information. The return policies are based on consumer protection law and it is applied accordingly. The actions and procedures were defined that employees need to take when getting product returns. The main argument for this chapter is that bad return experiences will be remembered. Those experiences might be shared, and companies may lose customers because of the negative feeling they were left with after the situation. It is good to go through these situations and learn from them and never make same mistakes again.
7.9 Orientation

It is a process, usually longer for those new employees that don’t have much working experience. Everyone has had to learn working life’s unspoken norms and rules at some point, which is why new employees should be treated patiently and give them room for mistakes. It is good to give space and create a good basis for the colleague relationship as employees need to be working very closely together and be able to communicate efficiently. There are also different methods and ideas that can be used when orienting the new employee.

![Diagram of 5 steps method from Centre of Occupational Safety](image)

Picture 2. of 5 steps methods from the Centre of Occupational Safety (Työturvallisuuskeskus 2013, 2).

It was also an idea that in this chapter some orientation related methods and ideas would be suggested. Especially the 5 steps method in the Picture 2. that was discussed before, was felt important to bring to the Orientation Handbook. The main issue was that employees could get ideas and insight to the orientation of the new employees. It is up to the person (mentor) to implement the orientation the way they feel is appropriate for the new employee. One procedure might not be the best for everyone as employees are all from very different backgrounds.

In the orientation one of the most important factors is the new employee’s background. When orienting new employee that has no experience or very little, it is good to be very profound and explain why things are done the way they are, and what are the consequences if not done right. It should be avoided answering yes or no to questions, and instead give more detailed explanation.
Ice breaker and being able to evaluate the knowhow of the new employee is to ask what their relation and knowledge of the products of the company is and what they know about the company. Colleagues can show their favorite products when taking a break from explaining the work.

New employees need to be corrected so that they won’t think that they are doing things right when they are not. When correcting new employees, older employees shouldn’t be too aggressive. This can easily be seen as dislike and misinterpretation of the meaning. There is no need to act as someone else, all employees are welcomed to be themselves and bring their personality to work. Employees can keep in mind how their expressions and actions reflect on others. If you never have anything nice to say and everything in your life is miserable, it might be that you are not nice company for others.

New employees should be introduced to different communication channels as quickly as possible. The faster they are part of the “inner circle” the faster they will become part of the team. They should also remember to put their own contact information to those channels.

7.10 Orientation checklist

The orientation checklist can be found in the Appendix 1 of this thesis. The checklist consists of 2 separate lists; work place tour and 1.-2. days at work. In the 1.-2. days at work list, the mentor must go through the topics with the new employee. The list consists of things that are necessary for the employee to act independently at the job. Those things would be for example, cash system, technology, guards & safety. There are also many employment matters such as pay day, probation period and employee discounts that are usually gone through with the store manager.

The work place tour list consists of topics or places that are needed to be familiarized for the employee to operate independently and to be able to guide the customers. The places don’t need to be explained thoroughly but it is in good interest to explain what can be found in for example, logistics or warehouse. After the new employee has been
oriented on the topic, the mentor will mark the box and leave their initials to keep track on the orientation process. This way it is easy to follow what has been gone through with the new employee if the mentor changes.

7.11 Quick Guide

Quick Guide is an external guide that was a side project for the Orientation Handbook. For this Quick Guide, the case company gave specific instruction on topics. The purpose of the Quick Guide was to make an easy to follow instructions to operate the cash register system. The Quick Guide would be a printed version that employees could use if they didn’t remember how some cash operations were done.

![Diagram of Quick Guide](image)


In the Picture 6. is shown the concepts handled in the Quick Guide. The Quick Guide starts with an explanation of how a basic selling transaction happens. Basic action is when a customer comes to the cash register, what the sales person must do and the instructions for the use of the cash system. After the basic action, comes the changing of the product and returning the product. On those parts, it wasn’t necessary to write company policies. Employee’s should know the policies and those are also written in the Orientation Handbook. The specific instructions phase by phase for the cash
system were written. The same simplified instructions for the checking the stock were done as there are not any larger purposes or causes for that action.

In the end of the Quick Guide is visualized an emergency graph. The main message is that there is no mistake that an employee can make with the cash system that can’t be fixed. In case of cash system emergency, employees should always call the supervisor. The emergency graphic was left out of the thesis.

8 CONCLUSION

In the conceptual framework was introduced the supporting research questions for the thesis. The first question was: what will be themes in the guidebook? And how will these help the company? The themes and topics were found through the theory and discussions with the case company. The topics created the Orientation Handbook that will be used in the orientation of the new employees. The Orientation Handbook will hopefully decrease mistakes of the new employees and get them to act independently on the job faster.

The second question was: what are the things new employees stumble most in? The thesis doesn’t answer to the question directly in any part, but the question was asked in the questionnaire in Appendix 2. The answers didn’t reveal anything new that wasn’t already discussed with the company’s supervisor. The answers defined the topics that are in the Quick Guide.

The 3rd research question was: how will the company benefit from the employees that do their job well from the start? The question is very similar to the supporting question of question number 1. The supposed results of the Orientation Handbook in other words, the benefits are that the employees are able to work faster independently on the job. The concrete results will be known when the Orientation Handbook is taken into use in the case company.
The recommendations based on the theory and development of the Orientation Handbook are that the company should now review the work. The case company has a chance to test and develop the information in the Orientation Handbook. It should be discussed in the management level to search errors or if there is still something that could be added to the work. After reviewing the Orientation Handbook and after getting approved by the higher management it can be published. The case company can decide how they wish to publish it or if they wish to use it as basis for other operations.

The external part, Quick guide, still needs modifications to the appearance for it to be easy-to-follow. After the modifications, it is sent to the company’s supervisor for approval. It will be most likely published as soon as possible. It would be great help for seasonal part-time employees.

For future, as the case company didn’t have the Orientation Handbook before, they didn’t have for example these after orientation discussions with the new employees to get their feedback and feelings on the orientation. For this to be implemented, it needs first to be approved by the managerial level of the company and solved if it is something that the new employees would need.

9 FINAL WORDS

The thesis topic was discussed with the case company already in 2017, but due to the thesis author’s motivation, was not acted upon before end of summer 2018. The thesis’ timeline has been very strict with only 4 months of time. The strict deadline was because of the author’s need to graduate as Bachelor of Business Administration at the end of year 2018. Challenges for the completion of the thesis were caused by the author’s inactivity of almost 3 years in the world of studying. New platforms and functions were to be learned as well as gathering information. There was also a factor that the author was working but was able to lower the workload.
The process of the thesis felt very distant and confusing at times. On the other hand, it was a positive thing that the thesis had a very fast pace for completion. Otherwise the thesis might have ended up being more complex and vast than planned. From the beginning of planning the thesis it was very clear that the outcome should have a meaning and a real-life application. That has been the most valuable motivational factor during creating the thesis. Another highly motivational factor was the absolute deadline.

Most challenging in the writing process were the scope of the theoretical background and then combining it to the practical Orientation Handbook. The object was to try to make a theoretical background that would be of better quality and understanding the subject rather than focusing on many concepts without deeper thoughts. During the process, it was learned that the timeframe would not give in to all the functions that the author wanted to implement. Some thoughts had to be left out for the thesis to meet the deadline.

The goal was to create an Orientation Handbook for the case company, and that was created. The goal was met, and it is up to the case company to approve the contents in the Orientation Handbook and make correction as they see fit. It is wished that the case company would acknowledge the recommendations handled in the conclusion. The final discussion for the new employees was something that the case company could take into use and in the final discussion ask how the Orientation Handbook could be developed.
REFERENCES


APPENDIX 1

Write your initials and cross the box when you have taught the matter.

_____ □  COMMUNICATION CHANNELS (phone, email, store notebook)

<table>
<thead>
<tr>
<th>Work Place Tour:</th>
<th>1-2. Days at work:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work place (cash point)</td>
<td>Company history</td>
</tr>
<tr>
<td>Staircase</td>
<td>Work place tour</td>
</tr>
<tr>
<td>Warehouse/back room</td>
<td>Guards &amp; Safety</td>
</tr>
<tr>
<td>Tube</td>
<td>Get familiar with cash desk</td>
</tr>
<tr>
<td>Info</td>
<td>Go through work description</td>
</tr>
<tr>
<td>Recycling</td>
<td>Working hours and marking them</td>
</tr>
<tr>
<td>Logistics</td>
<td>Pay day</td>
</tr>
<tr>
<td>Staff cafeteria</td>
<td>Probation period 4months</td>
</tr>
<tr>
<td>Visual room</td>
<td>Holidays</td>
</tr>
<tr>
<td>Security</td>
<td>Sickness/Occupational Healthcare</td>
</tr>
<tr>
<td>Elevators (wheelchair routes)</td>
<td>Work clothing</td>
</tr>
<tr>
<td>Moving around the establishment (access card)</td>
<td>Phone usage (own/store)</td>
</tr>
<tr>
<td>Emergency routes</td>
<td>Employee discounts</td>
</tr>
<tr>
<td>Parking</td>
<td>Cash system (Quick Guide)</td>
</tr>
<tr>
<td>Other staff rooms:</td>
<td>Communication in company</td>
</tr>
<tr>
<td></td>
<td>Technology (computer, printer, phone etc.)</td>
</tr>
</tbody>
</table>
KYSELY -XX Oy

Hei!
Olen Noora Vuori XX:stä, teen opinnäytetyönsä ”perehdytysopasta” XX:lle. Voitte vastata suoraan myymäläsähköpostista tai omastanne osoitteeseen: XXXXXX Vastauksia käsitellään anonyymistä ja ne tulevat vain tämän opinnäytetyön käyttöön.

1. Mikä oli/on työsuhteen alussa ollut vaikeaa? Mistä aiheesta olisitte tarvinnet tai halunneet enemmän opastusta?

2. Mitkä ovat mielestänne 3 tärkeintä asiaa perehdytysessä?

3. Millaista on hyvä asiakaspalvelu? Onko teillä vinkkejä asiakaspalveluun myymälässä?

4. Jos teillä on jokin hyvä asiakaspalvelukertomus, niin kirjoittakaa tähän.