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Developing Orientation for Financial Advisors

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The objective of this Master's thesis was to develop the current orientation process for financial advisors at the target company, which is a large Scandinavian agent in the financial industry.

The target company's orientation process was restructured recently and as a result the effectiveness of the orientation had deteriorated. The aim of the research was to identify which areas of the process were in most acute need of improvements and what actions could be done in order to develop the current orientation of the financial advisors.

The research approach used in the thesis was action research and the strategy implemented was a qualitative research method. Data was collected through interviews and the method was semi-structured. All the chosen interviewees worked within the company and in positions that were found to be most suitable to advance the research.

The key finding of the research was that the various areas of the orientation were neither well-structured nor connected to each other. Based on the findings from the interviews as well as information gathered from the literature research, a thirteen-step action plan was designed for the company. All the steps in the action plan were created to provide structure in the orientation process.

The proposed action plan was presented to and validated by the target company. The orientation process of the financial advisors is currently under review and it is possible that several of the development ideas will be incorporated into the future orientation model.

Keywords	Orientation, development plan, new employee, financial advisor, action research

Contents

1 Introduction

1.1 Overview

The objective of this study is to create an orientation development plan for financial advisors at the target company. The orientation program has recently gone through some changes, which has led it to its current form. The challenge is that the current way of orienting is too unorganized. Too much of the learning has been left to be managed by the new employee, by trusting that the employee is capable of adapting plentiful of new information and then after this use the information in practice, even if a situation where this information can be used might not occur in months. The company has a well-organized team of professionals who are teaching the knowledge by Skype, but unfortunately, it is not connected to the daily work. The meetings that the new employees take part in after their scheduled Skype-orientations can concern a wide range of topics.

The current way of orienting needs to be improved because, at the moment, the target company wastes its resources by extending the orientation time tremendously with an unorganized orientation program. This can result in discontent employees and to an increased risk for the company's image.

1.2 Business challenge

Based on the current state analysis presented later in chapter 4, the orientation in the target company is done through three different phases. The challenge with this is that none of the three phases communicate with each other. The first two phases are well structured, but they do not work smoothly with phase three, which is the orientation to the work and takes place at the office. The first phase can be separate, as it is only for the new employees to get to know the company and its values. The second phase, which is teaching knowledge through Skype-orientation, on the other hand, should take into consideration what is happening at the office. The same goes for phase three, as the orientation to the work should take into account what has been learned through Skype-orientations.

Another challenge comes from the fact that the orientators have their own work to be done and, therefore, cannot focus solely on the new employees' orientation. Also, in the current model, all the teams must have a designated orientator when a new employee arrives. This might be a challenge, especially at smaller offices, as there might not be a skilled enough or motivated enough orientator, which weakens the quality of the orientation tremendously.

1.3 The target company

The target company is a big financial service offering agent that operates especially in Nordic countries. In this thesis, I concentrate on how the introduction should be done nationally, but I cannot see any reason why it could not be applied globally as well.

1.4 Objective, scope and thesis outcome

The objective is to develop the orientation for the financial advisors within the target company.

The scope of the study will be limited to improving the current ways of orienting. I will create a plan that specifies how the target company should do its orientation based on the needs and realities of the company. I will try to find out what are the main issues in the current model and create a plan on how to solve them based on the interviews and literature that I will find. The focus is on the ways of orienting; it is not about creating instructions for the orientator or the new employee, but about improving the current model. I will aim to identify different aspects that should be developed and based on this, I will create the plan.

The outcome will be a plan to improve the current orientation for financial advisors at the target company. It will be in a written form that contains a list of the most significant changes and improvements that should be done to improve the process. I will seek the answer to these central questions:

- How could the different parts of the orientation process be better connected to one and other?

- How can the orientator focus on orienting besides his/her primary job as a financial advisor and how do the additional duties affect the work?
- What are the responsibilities of an orientator and superior?
- How can the use of the Skype-orientation be improved?
- Is it possible to add any customization in the job description?

1.5 Key terms

Banking advisor = An advisor that works mainly with daily banking errands i.e. offers advice and opens cards, accounts, internet banks, new customer ships, etc.
Financial advisor = An advisor who is mainly focused on finance and/or investments. At the same time, he/she focuses more on the customers' overall banking errands, and the meetings are longer and more customer-oriented than with banking advisors. In this thesis, it means an advisor who focuses on finance instead of investments.
Orientator = The person who orientates (ie. teaches new skills to a new employee), refers to an orientator whose primary work is to orientate, but also to an orientator, whose primary job is to be a financial advisor, but who has been designated to be an orientator besides his/her own work.
New employee/newcomer = New employee, but it also refers to a worker whose job description has changed or who comes back after a long absence.

All the persons that I talk about will be referred to so that their identity will not be revealed. That is why I use a lot of "he/she" rendition.

1.6 About the researcher

I have experience of orienting from two different instances. The first time was when I became recruited to an orientation team whose work was to focus on orienting. The team was oriented new and returning (from example, after a long absence) financial advisors. The orientators on the team could focus solely on the orientation as there were no other goals than to orientate the new employees as well as possible. In my opinion, the team worked quite well and could focus exceptionally well on the individual's own development areas. I got a confirmation for this also from the interviews as one of my previous team members from the orientation team (a current superior) told me that nowadays, the results are weaker, and it takes a lot longer to get the orientation done. The team was shut down in early 2018.

The second time I got to be involved with orienting happened surprisingly after the thesis was already almost done. A new team was built to orientate the new financial advisors, also as the team's main work, on a pilot that would last through the summer, and I was asked to be one of the orientators.

2 Research design

2.1 Action research as a research approach

The research approach used in this thesis was action research. Action research is an approach that combines practical development work with research. While traditionally, the researches have wanted to find out how things are, within action research, it is about finding information in order to improve the current practices. (Heikkinen, Rovio & Syrjälä 2006, cited Valli & Aaltola 2015, 204) The research wants to find out how things should be instead of how they are. The information is gathered to improve current practices. (Valli & Aaltola 2015, 209)

The word “action” within the research method comes from the peoples' social interaction within each other. Action research starts with the idea that the theory is within practices and vice versa. (Valli & Aaltola 2015, 205)

It is good to acknowledge that while in traditional research methods the investigator keeps him/herself apart from the object, in action research the investigator is a part of the community which he/she investigates. This causes the research not to be completely objective within the word’s most usual meaning. (Valli & Aaltola 2015, 214)

The action research process should consist of a few elements. The first stage is gathering the material out of a systematic literature review. Previous empirical research and theories are being reviewed within this framework. Bit by bit the focus is being allocated towards the focal point of the research, which pinpoints what exactly is the main goal of the research. Based on that, the research objective and research problems are being formed. When the material has been gathered and results analyzed, the process advances to pondering and conclusions. At this point, the conclusion should tell what this research has given to its audience or the development of practices. (Valli & Aaltola 2015, 209)

In my thesis, the research was done pretty much the same way. After coming up with an idea of what was needed to be developed at the company I worked for, I started searching for information on the subject. This opened up the different aspects of orientation and gave me insight into what the orientation could be and how it differentiated from what I knew it was within the company. It clarified the objective as well as some of the problems within the organization's current orientation model. Even more importantly, I got to know which questions would be needed to ask in order to achieve the wanted outcome. I was able to pick certain questions that I knew would likely point out problems or give me developmental ideas.

The interviews then confirmed some of my thoughts about the orientation and also gave acknowledgment of many of the problems which I did not know about. The phase helped me to build a proposal on developing the orientation process. Validation was done by sending the proposal to a person who manages the development of the financial advisors' current orientation, and after the validation, I was able to make the conclusions about my research.

2.2 Data collection and analysis

I collected all the data from the interviews. The research consisted of meetings, in which I interviewed eight people plus sent the results to get validation for the research project. In addition to the e-mail, I had five live interviews and one telephone interview, from which I only took notes. All the other interviews were recorded. I also transcribed the outline of the transcripts as an attachment to this thesis.

Data round	Data type	Data source	Date	Recording method and time of the interview	Purpose/Focus
Data 1 & 2 Current state analysis & Building the pro-posal	Live-interview Live-interview Joint live-interview Telephone-interview Live-interview Joint live-interview	Superior New employee Orientator & a new employee A member of a team that plans the orientation Superior / Former orientator Orientator & a new employee	15.3.2019 2.4.2019 5.4.2019 24.4.2019 6.5.2019 10.5.2019	Recorded, 17.16 min Recorded, 24.20 min Recorded, 40.35 min Notes, approx. 1 hour Recorded, 27.10 min Recorded, 56.12 min	The current state of orientation and start of creating the proposal
Data 3 Validation	E-mail	Member of the team that plans the orientation	14.8.2019	Word-file attached to the e-mail	To get feedback and validation for the proposition

Table 1 Data Collection

Table 1 shows how and where the data was collected.

2.2.1 Research strategy

The strategy applied in this thesis is done as qualitative research. The baseline for qualitative research is to describe real life. It includes the thought of reality being variable. It is essential to take to note that it is not possible to shape reality into arbitrary pieces. The subject of qualitative research needs to be investigated as comprehensively as possible. (Hirsjärvi, Remes, Sajavaara 2007, 157)

There are multiple subtypes in qualitative orientation, but the following seven are typical to any qualitative research:

1. The nature of research is about a comprehensive gathering of information and the material is being gathered through real and natural situations.
2. Prefer human as a source of information.
3. Use inductive analysis, where the researcher tries to find new, unexpected aspects. The researcher does not define what is important.
4. Use of qualitative methods in the gathering of information. This means methods where the ones being investigated get to use their voice.
5. Choose the investigated people on purpose, not by random sample.
6. The research plan gets shaped when the research progresses. Research is done flexibly, and the plans can be changed throughout the process.

7. Handle the incidents as unique and interpret the material according to it.

(Hirsjärvi etc. 2007, 158, 160)

The biggest weakness within qualitative research is that people interpret the questions from their own view and with their own understanding of the subject. The same answer can be described in many ways. (Hirsjärvi etc. 2007, 156)

2.2.2 Interviews as a data collection method

I chose interviews to be the method for gathering material. Interviews are one sort of conversation, but in a normal conversation, both parties are quite equal. In interviews, the interviewer is in charge of it. As a research method, interviews are a systematic way of gathering information. It has objectives and the purpose of getting as trustworthy and valid information as possible. There are several different ways to do the interviews. I chose a semi-structured way to interview. It is an interview method where the thematics are well known in advance, but the exact order and way of asking the questions is not yet decided. The results can be analyzed and interpreted in many ways. (Hirsjärvi etc. 2007, 202-203)

From several different interview methods, I chose the semi-structured way of interviewing because I wanted to have a real conversation with the interviewees so that it would not feel intimidating for the persons I interview. Still, I do not have enough experience from interviewing to have an open interview where the interviewer interviews without any solid body. In an open interview, the interviewer figures out the interviewee’s thoughts, opinions, emotions, and apprehensions when they come up during a normal conversation. It requires more skills from the interviewer than the other interview methods. (Hirsjärvi etc. 2007, 204) Even with this semi-structured way of interviewing, I was able to create an open environment, which did not feel too much like an interrogation. The interviewees were allowed to voice their opinions in a more straight-forward manner than perhaps by having a stricter order in questions. The semi-structured interview method also worked to my benefit as I was able to shape my work as the research progressed and also develop future interviews based on the insights I had gained from previous interviews. Without having the possibility to change the interview-questions, I would have lacked many answers I was now able to get. I also received positive feedback from the way the interviews were conducted.

The interviews also gave me the possibility to make some observations. With interviews, it is possible to get to know what people think, feel, and believe in, but they do not necessarily tell what is really happening. With observations, it is possible to discover if the persons truly act like they say they do. (Hirsjärvi etc. 2007, 207) I did the observations loosely while interviewing, but I could, for example, tell how genuine the persons were and what subjects they truly felt were important. This helped me to pick up the most relevant subjects and create a proposition for improving the target company's orientation.

2.2.3 How the interviews were done

I created the interviews based on the research I made about the orientation. The research helped me to know what is essential and what I needed to ask. I wanted to find answers on how the orientation should be organized to make the training time more consistent and the learning easier. I ended up creating around 15-20 questions for each interview but used many same questions in them. When I interviewed people with the same title, I used more of the same questions so that I could get more sides to every story. After each interview, I also came up with a couple of new questions that I realized I needed answers to. As the interviews progressed, I felt that my questions got more beneficial and that I was able to already come up with some ideas on how to develop the current orientation process and discuss those ideas with the interviewees. Also, the interviewees expressed their opinions about what needed to change.

I interviewed two orientators, three new employees who were still being oriented, one person who worked in a developmental team and two superiors. One of the superiors was also a former orientator, who had done the orienting as a full-time job. After creating a plan on how to improve the orientation, I also sent the results to another person from an orientation development team to get validation for the plan.

I did two of the interviews as a joint-interview with the orientator and the employee, whom the person was orienting. I let the interviewees decide if they prefer to get interviewed alone or together, and in both cases, they picked the joint-interview. In these interviews, I felt that the atmosphere was even more relaxed and open as the interviewees probably got support from being there together and the discussion went maybe a bit further as the other person could add some more value to what the first interviewee said.

Based on the data I collected from the interviews and conceptual framework I was able to pick up the main discoveries and address those in chapters *4.2 What works*, *4.3 What does not work* and in *5.2 Proposition*.

2.3 Interviews

In this chapter, I will be going through each interview I did. I will tell briefly where the interview took place and how exactly they were conducted.

2.3.1 First interview

My first interviewee was a superior to a team of financial advisors. The person I chose to interview has a long experience from working with the company. The respondent has worked as a superior for a long time but has previously worked also as a financial advisor. I chose a superior to be my first interviewee as I figured that the respondent would be able to tell widely about the current state of the orientation and give me the best understanding of the current model of orienting. The atmosphere was quite unrelaxed when I started to record the interview. I could notice that the respondent wanted to be much more businesslike when the recording started. The interview was relatively satisfactory, but I got a feeling that the superior did not want to express his/her own opinions too openly because it was recorded. I probably had much to do with building the tension as well, as this was my first interview. The interview was done and recorded in a branch that the superior works in and it took only 17 minutes 16 seconds.

The first two questions were about getting to know the general goals of the orientation. With the question 3-6, I wanted to find out how the orientation was done, but also to get to understand the superior’s own opinions about the current state of orientation. The questions 7-10 were about the systematicity of the orientation. I wanted to find out how systematically the orientation is done and how does the follow-ups of the orientation work.

In the questions 11-18, I was eager to find out about the quality and methods of the orientation. The questions 19-20 were rather straightforward questions, from which I hoped to gain some concrete ideas on how to improve the orientation process. I also wanted to know (question 21) if the orientation was in-line with the company strategy, as according to Kupias & Peltola this is necessary for the orientation-process to be successful (2009, 52).

2.3.2 Second interview

For the second interview, I chose a new employee as I wanted to understand the process from a newcomer’s perspective. My goal was to find out what the interviewee, an employee with a couple of months of experience working for the company, thought about the current orientation methods, and how his orientation had gone. I recorded the interview with my phone, but this time the atmosphere was clearly more relaxed than the last time. I received positive feedback from the interviewee, who said that the interview felt conversation-like. I tried to make the atmosphere comfortable and build trust towards the interviewee, whom I did not previously know by telling about my work history and showing that I am on the interviewee’s side. Despite the positive atmosphere, I left the interview feeling that the employee still did not want to be too straightforward about the orientation. I felt that even though the interviewee did not admit this in the interview, the respondent had not received enough support during the orientation period. The interview was recorded with my phone and lasted for 24 minutes 20 seconds.

The first six questions were about the implementation of the orientation. I wanted to especially find out more about the Skype-orientation as that did not exist at the time I used to orientate. With the next three questions (7-9), I was aiming to understand the structure of the orientation.

The question 10-13 were about the ways to orientate as well as about the orientator. I also included a question about the values, as according to Kupias & Peltola the values should be inlined with the orientation just as the strategy (2009, 52). The last two questions were again about the pros and cons of the current orientation model.

2.3.3 Third interview

The third interview was done again in the office of the interviewees. This time I interviewed both the orientator and a new financial advisor who was at the time being oriented by the other interviewee. I felt the atmosphere in this interview was the most comfortable thus far. There was no tension, but the excitement could be felt, as both the orientator, and the newcomer were eager to tell their opinions about the current way of orientation. I got straightforward answers and was truly happy with the results. I recorded the orientation with my phone, and it ended up lasting 40 minutes 35 seconds.

I started the interview by asking how the orientation is done and with some questions about the orientator's role (questions 1-3). The next questions (4-6) gave me insight into the organization's role in supporting the orientator. The answers to these questions were also the first ones clearly in contradiction with what the other superior had previously told me in the first interview about organizing the orientation. The questions 7-11 involved questions about the Skype-orientation. I was keen on comparing the Skype-orientation method to the hands-on-orientation method.

The next questions 12-18 I picked because, according to the literature I have read, subjects around the questions are important in orientation. The subjects are also handled in my conceptual framework. Lastly, I asked the same two questions about the pros and cons.

2.3.4 Fourth interview

For the fourth interview, I wanted to interview a person that was in charge of the current orientation model. I contacted the head of the developmental department, who suggested I book a meeting with one other person from the same team. I had a telephone interview with that person. The respondent works in a team that plans the financial advisors' orientation around the country. We talked on the phone for nearly an hour and I took notes of the most important subjects. The respondent seemed to be aware of the problems with the current model and we had a good conversation. Still, I might not have gotten as concrete answers on developing the orientation as I hoped for, as after the phone call, I was still unsure of how the company would continue to develop the orientation.

When I did the interview, first I wanted to find out the respondent's job description more precisely and also what is the planner's opinion on how the orientation should be done. The questions 3-9 involved modifying the work, responsibilities and supporting the orientator, which are errands that are all handled on the conceptual framework. The next three questions 10-12 were about the observations I had done in the previous interviews and the last two questions concerned once again what the interviewee thought should be kept and improved within the current orientation.

2.3.5 Fifth interview

In the fifth interview, I was able to get more clarity on the problems within the current orientation model than in any of the previous interviews. This was to be expected as the interviewee was superior to a financial advisors' team who had previously worked as an orientator. The orientator-work was back when the orientation was done as a primary job. We did the interview on a terrace of a fitness center and the mood was very good and developmental. It was evident that the respondent truly wanted to improve the current orientation process. I recorded the interview with my phone, and it took 27 min 10 seconds.

My aim was to start with general questions in the beginning, but as I already got a profound and much broader answer to the first question than I had anticipated, the next question got already right to the point. I wanted confirmation that the former orientator had seen the difference between the new orientation method and the older one. The questions 3-5 and 15-17 were all about getting confirmation on how to improve the current model. The questions 6-7 were about responsibilities and involving the team, which can both be found from the conceptual framework. The question 8-9 was about the use of time, which according to the literature I read, might be the biggest challenge preventing a successful orientation. The questions 10 and 12-13 were asked in most of the interviews to help to create the development plan. Question 11 was mostly out of curiosity, but it also validated the significance of this interviewee.

2.3.6 Sixth interview

This interview was another joint-interview, which included an orientator who had started as a financial advisor just a little over six months ago and a new employee who had never worked in the financial industry before.

The interview had the best atmosphere I had in any of my interviews; the respondents felt genuine and had had some struggles that they wanted to share with me. Even despite the struggles, the excitement of the orientator was overwhelming. The interview took for 56 minutes 12 seconds and it was held in the branch of the two interviewees.

The first questions to the new employee (2-6 & 12) concerned the experiences of the respondent thus far. The aim of these questions was to help me to understand how the orientation had gone in practice. The questions for the orientator (questions 1 & 6-11) were at this point already quite specific as I had already found out so much from the previous interviews that I now wanted to get more specific answers and confirmation to some of the issues I had identified as possibly needing improvement. Also, the next questions for the new employee (questions 13-14) were aimed to get confirmation on the aspects that needed improvement in the Skype-orientation. The questions 15-19 were based on the conceptual framework as they once again handled about getting support and modifying the role.

This time we did not have time to ask about what to keep with the current orientation; however, I gained great insights on what to improve.

2.3.7 Seventh interview

The seventh interview was the validation part of the development plan. I sent an e-mail with the current state analysis and the development plan proposition to another person that plans the current orientation. As a response, I got a word-file attached to an e-mail that had an answer to each developmental step I had proposed. The person works closer to the Financial advisors at the moment than the fourth interviewee as the respondent is currently leading the planning of a new orientation team pilot, where I had the chance to orientate financial advisors recently.

2.4 Validity and reliability

2.4.1 What are validity and reliability?

Validity means the ability of the research to measure what it is supposed to measure (Hirsjärvi etc. 2007, 226). Reliability means the ability of the research to give non-coincidental results. The reliability of qualitative research comes from explaining how the research is done. In interviews, reliability can be increased by telling about the circumstances and places where the material was gathered as well as the possible distractions, misinterpretations, self-evaluation and the used time. (Hirsjärvi etc. 2007, 226-227)

2.4.2 Reliability and validity of the data collection

In my research, the reliability was built by telling about how and when the interviews happened as well as about my own feelings and the atmosphere around the interview. The persons I chose to interview, enhance the validity as they represent the financial advisors' team from a wide variety of different organizational levels. Having interviewed superiors, orientators and new employees, as well as people from the orientation planning, gave me enough data to form an unbiased opinion on the developmental areas. Also, the chosen interview questions improved validity because they were largely based on literature research.

3 Conceptual framework

3.1 Employee orientation

Development and changes happen constantly all-around society. Whether it is about a new job, ownerships changing or new principles, orientation is always needed in a time of a change. For the employer it is very important that a new employee gets in touch with his/her work as soon as possible and that way he/she can be just as efficient to the employer as the more experienced employees. (Kangas & Hämäläinen 2008, 1)

3.1.1 What is employee orientation?

Employee orientation is mostly seen as a wide concept which involves the orientation for the work and for the company itself. Besides introducing the employee to his/her job, orientation should consist of different practical actions that are meant to improve the employee's skills and knowledge and introducing the workplace and the whole organization. Usually, a new job or a new work description brings out a need for orientation, but it is also provided when the work tasks change within the company or when one returns after a long absence. The goal is to help the employee so that he/she learns what the work is about and can manage the work independently. A good orientation takes into consideration the skills that the employee has and tries to utilize these existing skills throughout the orientation. (Kupias & Peltola 2009, 9, 18-19).

Orientation is not only about improving skills and knowledge, but can also be about helping the employee to notice, use and improve skills that he/she already has. Orientation is always unique. The company’s way of acting and standard rules need to be considered just like the new employee's own experience and background. (Kupias & Peltola 2009, 20) According to Juuti & Vuorela (2002, 34), the most important goal of orientation is to make the employee feel that he/she is an important part of the work community.

Employee orientation is a standard procedure in nearly every organization, but unfortunately, the quality varies a lot. Labour code obligates the employer to conduct the employee orientation well, but in many cases, other urgent tasks may seem more critical to the employer, and the orientation is completed in a hurry or not planned well enough. (Kupias & Peltola 2009, 9).

It is important to keep in mind that the new employee can not receive or adopt a large amount of information at once. Only the most necessary aspects should be addressed during the first days. After this, the orientation can be deepened step by step. (Piili 2006, 125) The first days and weeks are crucial for the beginner as they create the foundation for work motivation and attitude. At this point, everything is still new, and nothing is definite, this includes all the little things like where the meeting room is or where can you get more paper, etc. (Piili 2006, 184)

A systematic orientation guides the personnel to work according to the objectives of the company. It helps to utilize the conventional ways of acting, knowledge and the company’s language and at the same time, creates a foundation for good collaboration and job satisfaction. (Piili 2006, 125)

3.1.2 Subcategories of employee orientation

There are four subcategories to orientation: general orientation, company orientation, workplace orientation and work orientation (Helsilä 2009, 48).

General orientation means the actions that the company takes in order to get the employee to adapt to the work and the work environment as flexibly as possible. The job description then defines the magnitude of the orientation, although in every orientation there are still some common subjects. (Helsilä 2009, 48) Company orientation is about going through the most important aspects of the company: its business idea, strategies, visions and company policies. Workplace orientation, on the other hand, is about getting to know the people whom the new employee will work with. This includes the closest coworkers as well as the possible clients. Finally, there is the work itself. Orientation to the work should always include introducing the commitments, hopes, and expectations that the company has for a new employee or for an employee changing their job description. (Helsilä 2009, 48) Orientation to the work is the area that my thesis mainly focuses on. In my opinion, this is the most important part of orientation and therefore, I will dedicate an entire chapter (3.1.3) for this subject.

Previously the other aspects of orientation (company orientation and workplace orientation) were not considered that necessary while the orientation to the work was regarded to be sufficient. When the organizations and job descriptions became more complicated, the orientation covering only the work itself was not enough anymore. Today the employee needs to understand the organizational structure and why the company exists. As a result, the orientation needs to be broader than before. (Peltola & Kupias 2009, 13.)

3.1.3 Orientation to the work

Orientation to the work needs to be planned carefully. The trainee will need to be able to learn by training, experimenting and doing. The trainee must evaluate him/herself constantly as well as get feedback from the superior. (Helsilä 2009, 49) In my opinion, the feedback can also come from an orientator or even from more experienced colleagues.

Through the feedback, the trainee finds out what he/she is good at and what still needs to be learned as well as some possible critical issues that need to be addressed immediately. The trainee is able to understand the demands of the company and by trying some new methods, his/her knowledge and perception evolves. The orientation must be done by stages and offer the trainee a possibility to discuss the experiences with the trainer or the superior. (Helsilä 2009, 49)

It is notably the orientation to the work that separates good companies from weaker companies. If the company invests in orientation at a later stage, it is not as beneficial anymore if the employees are non-motivated or frustrated due to previous lack of orientation. (Helsilä 2009, 50)

3.1.4 What are the goals and benefits of orientation?

The economic benefits of orientation are significant as the orientation can reduce staff turnover. If the new employee leaves the organization already at the start of his/her new work, the company loses all the investment made during the recruiting and orientation processes and needs to also repeat the entire recruiting process. At its best, the new employee can bring great relief to the current workload and increase the company's efficiency. (Eklund 2018, 20) Only the immediate costs from recruiting are easily two or three times the costs that an employee earns per year (Kjelin & Kuusisto 2003, 73). The orientation creates the basis for the employee to be more satisfied, less absent and more committed to work productiveness. There is no economic reason to leave the new employee without orientation. The immediate costs from orientation should not be considered as a reason to not invest in orienting, because the indirect costs of lack of orienting are much higher. (Kjelin & Kuusisto 2003, 22)

The company's ability to compete against other organizations is mostly based on the employees' competence, use of the competence and time that it takes to be able to learn new skills. It is still not enough to develop personnel if the skills being developed are not connected to the company's goals. Sure, this helps the employee to be more pursued in the labor markets, but it does not help to achieve the company's goals or objectives. (Viitala 2007, 170)

Orientation is still just a beginning; the effectiveness of work and employees' own development possibilities need to be cherished ever after. (Kupias & Peltola 2009, 20) The employee him/herself learns the job much faster with a good orientation and more importantly, learns it the correct way right from the start. Mistakes and incidents occur less and consequently less time is spent on correcting them. (Kangas & Hämäläinen 2008, 4) Often correcting mistakes requires time from several people; hence the time saved can be noticeable (Joki 2018, 111).

Orientation can build up a solid ground for the employee to commit to the company for a long time. Giving a good first impression is essential, and proper orientation is precisely that and can carry on over rough times that may come in the future. (Hietala, Kaivanto & Valvisto 2017, 162) With proper orientation, the employee’s attitude towards the work and the company is positive and collaboration with the superior and teammates gets easy. This also creates a positive employer image even outside of the workplace (Piili 2006, 184).

On the other hand, lacking a proper orientation can create a negative employer image, which is always hard to change afterward. Therefore, it is important to have a proper orientation even with part-time employees, trainees, and summer workers. (Joki 2018, 114) Understanding the benefits of orientation often results in developing the orientation process and allocating the resources in it, which is necessary in order to plan and execute well-working orientation. (Eklund 2018, 25)

From the company’s point of view, orientation is, in the end, a way to make the employee efficient for the company earlier, so that the return on invested capital is faster (Kjelin & Kuusisto 2003, 14). With an excellent orientation, the company can create a competitive advantage (Kjelin & Kuusisto 2003, 20).

One of the main responsibilities of a superior is to take care of the competence of his/her employees. A cautious orientation is a conscious choice, but the same way a badly done or an insufficient orientation is a choice – even if it is done because of hurry or lack of personnel. It is just a choice that contains many more risks. Taking responsibility out of orientation means offering the possibilities, but also following the process. This is an important part of a superior’s job description that should not be taken lightly. (Kupias & Peltola 2009, 53-54) It is also beneficial for the new employee to know when the next follow-up meeting will take place, as this creates assurance for the employee that his/her orientation is being taken seriously. Beyond this, it offers an opportunity for the employee to express some possible thoughts and concerns that might be more difficult to express within the regular work. (Joki 2018, 121)

One goal of the orientation should be to increase the company’s own development possibilities (Hietala etc. 2017, 163). A new employee always brings some perspective from his/her previous experiences. The new person's opinions are often valuable and fresh and should be listened to carefully. It is vital to be open to these opinions. If the company is aware, it can pick the best and most suitable ideas from the new employee and develop the whole organization (Hietala, etc. 2017, 162). Many times, the old work processes are stuck in the company, when it would be beneficial and efficient to take a look at the current ways from an outsider's perspective. Giving feedback and opinions both ways makes an efficient orientation possible and it is also the only way to connect the organization's and individual's goals closer together. Commitment to the work gets much more likely when the employee has some possibilities to develop it by himself/herself. (Eklund 2018, 38-40) It creates a good spiral for development, if the company makes it a goal to change even one thing based on the feedback by a new employee after every orientation (Hietala, etc. 2017, 171).

3.2 Biggest parts of the puzzle

Good orientation can be done in many different ways. In some organizations, the orientation is mostly in the hands of HR-professionals, while a growing number of organizations have started to involve the whole work community and even the new employee in the orientation. In other organizations, the superior is responsible for almost all of the orientation and in some organizations, the orientation is almost completely done within the named orientators. The orientators job descriptions might be extensive and involve also orienting the more experienced employees. (Kupias & Peltola 2009, 46) I have personally worked with the previous kind of responsibility. We were almost completely responsible for the new employees' orientation, and we did get occasionally different tasks to help the other employees as well. At times, we did nationwide Skype-conferences for all the new employees or to the whole personnel. At those, we taught about some changes in procedures or on how to use some tools for example.

3.2.1 Whole work community as an orientator

Learning and orienting always involves the whole work community, even if we would not plan so. What the new employee sees and hears affects his/her thoughts. This is why it would be important to have the whole work unit someway connected to the newcomers learning. (Kupias & Peltola 2009, 76) In an optimal situation, the whole team would have some part in the orientation process. This way all of the employees would feel responsible for the new employees' orientation and get to know them already from the start. Still, there is a risk that not every employee of the work unit is interested in orienting or knows their tasks as well as they should. Also, when having so many orientators, that are not precisely picked for the orientation job, there raises the question if everyone can keep their own thoughts about the work, organization or co-workers aside. (Kupias & Peltola 2009, 81-82)

3.2.2 Whole work community as a learner

Having a new employee starting at a company gives many learning opportunities for both the work unit as well as the new employee. Taking a note out of these is a harder thing. It is not easy to question the ways the company is currently acting. The new employee must be actively stirred up into it and offered the possibility of questioning. That is not still enough if the work unit is not eager to make any changes based on the feedback. Principally, all the way of acting that does not have a good reason why it is done a certain way should be changed. An explanation: “This is the way it has always been”, is never good enough, and will not convince the newcomer either. Then again, some of the things, like values, for example, are written in the stone, and it is hard to change these even with a longer period. It is not completely inappropriate to make notes on these, but it is fair to let the newcomer know which things he/she can change and in which things he/she should be able to adapt. (Kupias & Peltola 2009, 78-80)

Being from outside of the organization can be easiest utilized when the orientation process is customized or dialogical (more about these in chapters 3.3.4 and 3.3.5). Still, despite the orientation models, in a single orientation situation, there should always be left room for two-way feedback. The things that can quite easily be changed are usually about the work unit's way of acting. Those are also commonly sensitive subjects that require gentle feedback. The new employee, on the other hand, can easily feel him/herself let down if the feedback he/she has given is not taken seriously or is being offended about. It is a delicate subject that can cause conflicts either way. It is not enough if the company asks feedback from the newcomer if the work unit’s own skills of taking feedback are not on a good enough level. Being open and accepting of feedback should become a way of acting in any organization. (Kupias & Peltola 2009, 78-80)

3.2.3 Named orientator

A suitable method for orienting is to name an orientator from the team whose responsibility is to introduce the new employee to his/her new work environment. Ideally, this would help the employee to learn the team's ways of working as well as all the "silent knowledge" that is not written on the orientation programs. (Hietala etc. 2017, 165) The named orientators should be trained and given the proper tools for the orientation to make sure that the orientation quality is equal for everyone. (Hietala, etc. 2017, 167).

For a company, giving a proper and high-class orientation does not just happen by itself. Improving and implementing orientation takes many different special skills. A named orientator might be the channel that brings these skills for the work unit. The orientation is usually done alongside with own work, but it can still take a lot of time and effort. Named orientator works in a team by collaborating with the superior, who has the final responsibility of the orientation. Some parts of the responsibility might still be given to the named orientator. It is essential to agree on these precisely on every occasion because the lines between orienting the new employee and having a supervisory responsibility with power are many times thin. Still, the orientator will not usually have supervisory power and, therefore, cannot have its responsibility. (Kupias & Peltola 2009, 82)

In some companies, there are named orientators that tear themselves away from their own job every time a new employee starts and focus intensively only on the new employee's orientation. This is only possible if many workers do the same job within the company. It is also possible that the orientators only job is to orientate. Then the danger is that they might get too loosen from the job itself. (Kupias & Peltola 2009, 83) In my opinion that should not be a problem at least in a customer service job, where you take customers together with the new employee. There you try to make the best possible example for the new employee and later on follow up intensively when he/she take the customers. Therefore you are always on the field.

In many companies, the named orientators role is even bigger. They work alongside the bosses and are involved already in the stage of recruiting. They are meant to coordinate the new employees' orientation in its entirety and involve other orientators in it as well. The job might also involve current employees' orientation when new ways of working are introduced. The role of the orientator might eventually change more to a work unit's inner developer. A good and versatile orientation does not happen by itself; it requires a lot of work. A named orientator and the superior can create excellent orientation practices together to help the team. (Kupias & Peltola 2009, 83-84)

In any larger company, it is good to create and maintain an orientator-network, where the named orientators have a meeting regularly in order to exchange thoughts about new and important aspects of the orientation. This can be a big motivation boost for the orientators as well. (Kupias & Peltola 2009, 84)

3.2.4 Choosing an orientator

It is crucial to choose the right person for orienting, someone who is enthusiastic and has not just the professional skills, but also skills to steer the new employee in the right direction. Besides finding the most suitable person, the superior must support the orientator throughout the orientation process. The orientator needs to be trusted, listened to and given enough mandate and resources. Especially a new orientator needs a lot of superior’s support and also steering in his/her new job. Orientators have a massive role in spreading values and the right practices. (Kupias & Peltola 2009, 57)

An Employee whom have gotten a good orientation will most likely not forget the experience and can motivate others as well. A good orientator is usually someone who has some experience but is not too stuck in his/her habits. Even though one needs to have professional skills to orientate, it brings more significant benefits when the organization’s culture expects each employee to be involved in the orientation at their turn. This divides the workload. (Kjelin & Kuusisto 2003, 195) I would also think a significant benefit comes out of everyone knowing what it takes to orientate properly and how much time it takes, which leads them respecting the orientators time more and not disturbing their time of orienting.

Orientation requires especially time, motivation and understanding of the meaning of orientation. The leading quality of the orientator is the interest to help and guide another. A good orientator creates a relationship with the new employee and gets to know what the new employee needs to learn. The ability to tell about things easily is important as well as the ability to listen. (Kjelin & Kuusisto 2003, 196-197)

3.2.5 A small company vs. a large company

In a small firm, the orientation is usually simple. A business owner, who hires his/her first employee plans and organizes the orientation by him/herself. The only tool is probably a note list. In a big company, there are usually named orientators, hr-professionals, a unit that is in charge of developing and local superiors. There needs to be a consensus on how the orientation should be organized. With a lack of communication, the result will likely include overlapping work, highly variable practices and essential things that have not been learned. (Kupias & Peltola 2009, 46)

In more prominent organizations where there is much recruiting, it is natural to attach the follow-ups of orientation as a part of regular work (Kjelin & Kuusisto 2003, 246).

3.3 Orientation methods

According to Kupias and Peltola (2009, 36), there are five different approaches that the company can take when considering their orientation. The aspects introduced in the last chapter 3.2 are all assimilated within these methods. The writers seem to look the orientation as a developing journey for the company, that starts from basics and can then evolve step by step towards a dialogical orientation model where learning is the whole organization's course of action. (Kupias & Peltola 2009, 36-42) Surely it should not be completely impossible for a company to jump straight from a more basic orientation method to a more advanced one and skip a level or two. Although that would be a lot harder for the company because the level of demand increases throughout the way, adding each time something more on the previous one. That is why the companies will not probably try to “reach for the stars“ right from the start, and the development is more likely to be done step by step. Especially when the more advanced orientation methods seem truly hard to conquer.

It is good to notice that the company’s type and size affect hugely on which of the following orientation methods the company can use. Also, the steps can be taken back while having changes or cuts in the organization, so the development is not always straightforward. (Kupias & Peltola 2009, 36-42)

Companies tend to start the orientation by letting the new employee follow a more experienced colleague. Every new employee is taken into orientation individually and oriented by hands-on-orientation. When the company grows or the turnover of staff increases, some rebuilding is needed. The next step is to have a more mass-production type of orientation. The third step is to get the whole team or the work community involved in the orientation. This way the orientation process is continuously evolving. When the new employee is also involved within the orientation, then we are talking about customized orientation, and the final step is where the orientation is not even thought about anymore because constant learning has become the way of working for the company. (Kupias & Peltola 2009, 36)

The following orientation methods are freely translated from the Finnish sentences Kupias and Peltola used.

3.3.1 Hands-on-orientation

As mentioned earlier, hands-on-orientation is the simplest model. This does not mean that it would not be good or efficient. It should be in fact, a part of all of the different orientation methods. In most of the firms, it just happens to be also the only way of orienting. Hands-ono-orientation means a way of learning where the new employee follows a more experienced worker doing his/her job. Usually, the superior or some other suitable person takes responsibility for telling the newcomer about the company, work community and the tasks that the new employee is hired to do. Orientation is done alongside while working. It gives a chance to get to know each other well and find the right methods for orienting the specific employee. As all of us are individuals, the orientation is different with each employee. (Kupias & Peltola 2009, 36-37)

The results from hands-on-orientation can be excellent or terrible. It all depends on the orientator. If the orientator knows the things he/she is orienting and can lead the newcomer in the right direction by truly delving into helping the new employee, the orientation can be exceptional. A good orientator makes the new employee not just learn well, but also feel very welcomed in the job. A bad orientator, on the other hand, does not care about the new employee, which can quickly end in a distant relationship, where the newcomer has to learn by himself/herself. Orientator can also fail by not knowing how to guide the employee or by being too insecure. It is crucial that the orientator has time to do the orientation. (Kupias & Peltola 2009, 37)

When the orientation is only on one person's hands, his/her unique skills and process of allocating time for various tasks becomes essential. Orientator should be able to see the needs of the company, as well as the employees and, have know-how on how to guide the employee on ups and downs. He/she needs to also filter the opinions and thoughts he/she might have so that he/she would not influence the employee too much. The employee needs to develop his/her own opinions. Overall the model benefits from clear responsibilities, but the quality is also too depending on the skills of one person. (Kupias & Peltola 2009, 37)

I believe that in many cases where the orientation has failed, it has not been because of a lack of interest from the orientators side, but because of the lack of time that the orientator has been given for the job. If the orientator gets a side job to orientate while still having the same regular tasks as before, the person might tend to priorities his/her own work ahead of the side job, especially if the work is goal-oriented. Orientation can easily be seen as extra work that does not show in any measurable indicators, and if we use too much time for it, we might even hear about it when the goals of our own work are not reached. This is why I think it is crucial to agree on the terms on how to make the orientation before accepting to orientate someone.

3.3.2 Model orientation

The model orientation is clearly organized. Work and responsibilities are well defined, and materials provided by another department. The materials might include orientation and development programs or new employees' checklists and requirements. The HR-department tends to take a more significant role within the orientation by providing the materials and by developing it. This role is usually hooked up with the general orientation (including company orientation), which can be implemented and organized the same way throughout the organization. The orientation itself, alongside the orientation to the workplace, will usually still be done within the workplace. The risk here is that the general orientation and the orientation to the work will be too divided. Even though it is very beneficial for the organization to unify its orientation processes, it is important to keep in mind that even the best models have no use if the orientator is not skilled or motivated enough. Therefore, the hands-on-orientation must be included in the model orientation just as seriously as in the previous orientation model. (Kupias & Peltola 2009, 38) Model orientation shines on providing tools for the orientator but might stiffen the orientation process as well. (Kupias & Peltola 2009, 38-39)

3.3.3 Quality orientation

Quality orientation is in question when the orientation has developed to a point where it has become too centralized. The need for improvements around the organization can not be observed well enough, and as a result, some parts of orientation is returned to the work units and teams who can develop the orientation to become much more flexible. When the responsibilities are given to the team or a work unit, the company needs to choose if it is only the superior, both superior and a named orientator together or the whole team that carries the responsibility of the orientation. Whoever has the responsibility, needs to consider the orientation as a process and be willing to develop it continuously further. (Kupias & Peltola 2009, 39)

As the superior most likely have many other tasks to do at the same time, it is recommended to give some of the orientation responsibilities to a named orientator or the team. (Kupias & Peltola 2009, 39) If the boss is the only one who is orienting, it can cause an excellent relationship within the employee and the boss, but it can also easily result in leaving the employee entirely alone, while the boss's priorities might be in other tasks than in orienting. (Kupias & Peltola 2009, 47) In quality orientation, the whole orientation process must be well portrait and the process needs to be followed intensively, so that it can be constantly developed further. (Kupias & Peltola 2009, 39)

Quality orientation should include all the best aspects of the prior two models. Its most significant upside is the team, which can be very flexible and product orientation that is up-to-date. The biggest concern within the quality orientation comes when the team has been given all the responsibility of the orientation altogether, which can easily mean that no one has a real responsibility of it. (Kupias & Peltola 2009, 39)

3.3.4 Customized orientation

In a customized orientation, all the services or products that are connected to the orientation, are divided into different modules. HR and different work units provide these modules and create a unique combination that suits the needs of a newcomer. Someone has to be the coordinator of the whole orientation process and combine all the different modules. The coordinator's role is significant because that person must have an understanding of all the different aspects of orientation as well as the skills to combine those according to the employees’ own needs. The coordinator is usually a superior or some other person who knows the field of orientation and is able to create an orientation plan based on a dialogue with the employee. (Kupias & Peltola 2009, 40)

In a customized orientation, the orientation process is not determined beforehand. The need for orientation is handled with each newcomer differently, based on the employees' own needs and skills. The dialogue determines how the orientation is done. To be able to use a customized orientation, the orientation needs to be already well-structured and in the process of constant improvement by the whole work unit. (Kupias & Peltola 2009, 41)

Customized orientation is an advanced orientation method that can create a truly committed employee that learns precisely the skills that are needed. Of course, this requires the newcomer to be firmly committed to creating and following the orientation plan. It can not be done without a coordinator that has specialized skills for the job. (Kupias & Peltola 2009, 41)

3.3.5 Dialogical orientation

Sometimes a new employee might come to a job that's job description is not precisely specified beforehand. The employee's work tasks can be determined based on his/her own skills and the company's needs. In dialogical orientation, the plans for the orientation are done completely together with the newcomer. Responsibility and execution are mostly assigned to the new employee. Listening to him/her and trusting in his/her own expertise is crucial. Even though the orientation is done based on the newcomer's vision, some things always need to be taught, like company values, etc. Orienting and learning are the company's way of acting; all the employees and clients are involved in it. (Kupias & Peltola 2009, 41-42)

In dialogical orientation the employee must have already quite some expertise and skills to be able to determine his/her own job description in order to benefit the company the most. The risks in recruiting must be a lot more significant than within a more general orientation process.

3.4 About learning

To a person, who is not acquainted with peoples' learning, the thoughts about learning come easily from own weekday experiences, including experiences from school. It is not uncommon that in work-life adults are being taught the same way as kids in a school. The situation will not even feel unnatural because it is based on our own everyday experiences. Also, the employee's thoughts and persona effects on how the employee should be oriented. If a new employee believes strongly that he/she learns best by doing the daily work, it is hard to motivate him/her to go through a lot of written materials. (Kjelin & Kuusisto 2003, 38-39)

Learning should not be about rote learning, which makes it possible only to copy the current ways of acting. Competitive advantage comes from being able to utilize, not only individuals skills but also each individual's differences (Kjelin & Kuusisto 2003, 38). The newcomer should never be thought helpless. With proper orientation, the individual's activity and skills are utilized ideally. (Kjelin & Kuusisto 2003, 53) Learning happens mostly in daily work rather than on educational conferences. An individual's growth and understandings enlargement usually happen within daily work. At the same time, it is largely seen as an interaction between people. (Kjelin & Kuusisto 2003, 39)

Leaving the new employee to do his/her job alone does not mean learning from experience. Just that something is experienced (or dealt with), does not necessarily lead to good learning. Understanding, analyzing and utilizing the experience leads to it. (Kjelin & Kuusisto 2003, 42)

3.5 Handling emotions

A new employee always has many feelings and thoughts running through them. Supporting the newcomer creates trust towards him/herself and the organization. (Kjelin & Kuusisto 2003, 57) Creating trust between the orientator and the new employee is one of the most critical parts of the orientation process and it can be a very subtle incidence. Trust is more natural to gain through a common objective. At its best, a joint objective creates a vision that supports common values. (Kjelin & Kuusisto 2003, 59)

From my own experience, creating a confidential relationship between the orientator and the new employee is even more important than between a boss and the employee or between the customer and the employee. After achieving confidentiality, it gets much more comfortable to give and receive feedback, get straight answers and find out the true feelings of the newcomer. It helps with focusing on the areas that need to be focused on, but also gives perspective about the mindset that the new employee has. He or she could have totally different thoughts about where he/she needs to develop. Also, the work will be much more enjoyable with a confidential relationship.

3.6 Planning the orientation

Planning brings coherence and effectiveness to each action. A good start for planning the orientation process is to ask the following question: “What does the work community expect from the employee’s succeeded orientation?” Deciding the objectives is essential, as is knowing where the process is heading. After this, one can start looking for the means to achieve the goals. (Eklund 2018, 14) The objectives should be more farsighted and broader than just to support the employee at the start of his/her new career. A good objective would be to get a committed employee and an organization that can renew. Both also play an important role within the company when it comes to making results. (Kjelin & Kuusisto 2003, 17)

A succeeded orientation process varies based on the individual and tasks, but some common grounds can always be set up before the new employee arrives (Eklund 2018, 76). There are plenty of planning to do already before the new employee even arrives. Who orientates? Is there one named orientator or many? What are their responsibilities and tasks? How is the orientation dealt between the orientators, other employees and superior? What are their competencies? How is the training done for the orientators? It is vital to have clear directions and enough instructions to everyone who is involved in the orientation process. (Kangas & Hämäläinen 2008, 6) Organizational development is only possible when the organization takes a systematic look at where it has succeeded and what kind of mistakes has been made. Systematicity is the key to learning from mistakes, but still, If the orientation is unplanned and changes by the occasion it is impossible to start improving it. (Eklund 2018, 37)

Just like in any team, planning an orientation should always include many different people from different backgrounds. This way, multiple different angles will be brought up already from the start. The mission is to create a vision of what the organization wants to offer to the new employee. Trying to figure out what would an employee who has gone through a perfect orientation process, think about the organization, helps in creating the objectives for the orientation and helps to build the orientation plan. (Eklund 2018, 74) It is crucial to have proper reasons for the ways that the orientation is done. The new employee needs to be heard and be able to influence the orientation process. When each person involved in the orientation process understands the reasons for the current way of acting and is able to have an impact on it, the more committed they are. (Eklund 2018, 30) After all, the quality of the orientation is most dependent on the experience and skills of the orientator (Eklund 2018, 36).

Company strategy guides the company’s actions, and therefore, an orientation that works in one place does not necessarily work in another organization (Kupias & Peltola 2009, 10). When planning or improving the orientation, the desirable orientation should be realistic by considering the new employee’s current skills and the organization's past ways of acting. Pursued orientation should always come from the company’s vision and strategy. (Kupias & Peltola 2009, 52) Organization’s ability to renew itself and commit to the employees is most efficient when the organization focuses on clear roles, getting to know the employee and creating co-operation. All three subjects are connected to one and other, and it is essential to focus on each one of them, not to only one of them. (Kjelin & Kuusisto 2003, 51)

Although the improvements of the orientation process are usually done based on the current processes, it is not wise to hold on to an obsolete process, or to one that does not serve its meaning. If that is the case, the old process should be thrown away. When it comes to the final orientation plan, it is significant to know why the exact model is being used and what is being pursued with it. When the plan is well justified, and it supports the daily work, it might be applied as a map of orientation that gives the company great assets on succeeding with the orientation. (Eklund 2018, 75) It is possible to modify the orientation plan quite easily while orienting, that is also the only way to implement a tailored orienting. Updating the plan while orienting, when the orientator gets more and more information about the new employee, should become a natural part of following the orientation. (Eklund 2018, 80) Whenever making a plan, there should also be a back-up plan in case of surprising events (Kangas & Hämäläinen 2008, 7).

When starting to plan and improve the orientation, it is crucial first to investigate the current situation. When evaluating it, it is essential to listen to opinions from people that work in different sectors of the company. A superior’s opinion might be totally different from the new employee’s opinion. Each opinion is just as important, but because each person looks at the orientation from a different perspective, the opinions are subjective. Listening to all kinds of opinions gives the most impartial outcome. (Kangas & Hämäläinen 2008, 25) It is also wise to develop the process continuously according to the given feedback after every finished orientation (Hietala etc. 2017, 161).

3.6.1 Socialization

One of the main tasks for orientation is to get the new employee to know the ways of acting within the work community, and to socialize, which means teaching the employee the professional role (Kjelin & Kuusisto 2003, 124). Socialization as a phenomenon relates closely to the new employee’s orientation (Eklund 2018, 81). On page 28 is a table I made by copying the idea straight from Annina Eklund's book “Tervetuloa meille! – Uuden työntekijän perehdytys”. The tactics within the table are based on the known six socialization tactics that according to Eklund can be used in planning the orientation. On the right side, the terms are connected to a flexible orientation process, and on the left side the terms are connected to a more formal process. The chosen tactics can be anywhere between the line. (Eklund 2018, 81-82)

Communal and individual

Both terms refer on how much the new employees are handled as one group. Communal means the same orientation methods and events for all the new employees. This includes common educational events that all the employees doing the same job needs to go to. The individual orientation tactic plans the orientation according to the individual’s skills, which requires much effort in getting to know the employee. To the outmost, all the orientation is done based on each employee. This is more likely to occur in smaller companies. (Eklund 2018, 82-83)

Formal and informal time period

It is about how accurately the time frame of the orientation is decided beforehand. The formal timeframe usually means an orientation period that is precisely defined. The employees can also be oriented in a separated workplace. Then the new employee transfers to the final workplace after the orientation. The informal time period is used when the time frame for the orientation is not decided beforehand, but it can be very flexible according to the employee’s needs. It is right on the occasions when it is hard to estimate how fast the new employee learns the needed things. (Eklund 2018, 83)

Step-by-step and random

These determine how predetermined the learning process is. An orientation done step-by-step has different areas or modules where certain subjects are handled one by one. The process progresses according to designated waypoints. A random process does not have a predetermined order for the subjects to be learned. New subjects are handled in the same order as they come. (Eklund 2018, 83-84)

Predestine and variable

Both terms illustrate the timetable that the orientation and its goals might have.
In a predestined orientation, the process progresses systematically so that the goals and tasks are scheduled to be achieved within certain dates. In a variable process, there might be a time frame set up to the orientation, but it lacks a strict order and a schedule. The subjects are handled in a variable order according to the situation. (Eklund 2018, 84)

Role model and self-learning

The terms describe the amount of responsibility the new employee has on finding the information independently and choosing the right ways of working for him/herself. Learning from an example of a role model means that a more experienced worker teaches the newcomer. The best ways of acting are already known, and everyone is expected to work the same way. In a self-learning environment, the employee's own proactivity is upraised. A lot of possibilities and authority is given on how he/she wants to handle the work tasks. Current ways of acting are not necessarily to be learned, but each employee needs to find their own way of working. (Eklund 2018, 84-85)

Breaking the identity and strengthening it

The subject is about how much each employee’s identities are taken into consideration on orientation. When breaking identity, the person's own identity and skills are not supposed to be shown. Instead, everyone should adopt the organization's way of acting. If the organization wants to strengthen the personal identities, the individual’s strengths and skills should be accepted and thought of as a possibility for the organization. The organization tries to develop and utilize especially those qualities. This tends to increase innovativeness and creativity as well as the employee's own experience of the meaningfulness of the work. (Eklund 2018, 85)

”Formal”		”Flexible”
Communal		Individual
Formal time period		Informal time period
Step-By-Step		Random
Predestine		Variable
Role model		Self-learning
Break the identity		Strengthen the identity

Table 2 Socialization table

On the left side's tactics in table 2, the role of the new employee is more passive. The new employee is not expected to bring a lot of new ideas to the organization. The goal is to learn the organization's current ways of acting to the employee's daily use. On the right side of tactics, the new employee's thoughts and qualities are appreciated and he/she is expected to be an active member of the organization. The organization is seen as a constantly evolving piece where everyone has a right and a responsibility to make an effect. Choosing the tactics signals the new employees about the organizational culture, behavior and expectations for the new employee’s activity. The chosen tactics should be uniform, and therefore, it would be good to discuss these with different parties already when planning the orientation. Improving starts always from acknowledging the current state. After this, it is possible to start thinking about the future and how to get there. (Eklund 2018, 86-88)

A professional combining of the tactics above can create an effective orientation process, but it is good to keep in mind that there is no commonly known right or bad tactics. All the organizations are different and therefore different tactics suit different organizations. No organization uses strictly only formal or flexible tactics on orienting, because it is always a two-way process, where both the organization and the new employee influence each other. When planning the orientation process, the table makes it possible to think about the tactics beforehand and come up with what kind of tactics support the daily orientation best. (Eklund 2018, 86) The more formal tactics are necessary because they create systematicity and safety. It is helpful to have a ground, where the daily work can be based on. In addition, it is easier to make more flexible decisions. Formal tactics fit when going through general aspects, but they do lack interaction. Individuals or their needs are not being thought of. When going deeper in learning of the work tasks, there is usually also a need for some flexible and individual interaction. (Eklund 2018, 86-87)

3.6.2 Work safety law

According to Finnish law, the employer must give proper orientation to the employee.

A direct quote from the occupational safety and health act:

> *”Employers shall give their employees necessary information on the hazards and risk factors of the workplace and ensure, taking the employees’ occupational skills and work experience into consideration, that:*
>
> *1. The employees receive an adequate orientation to the work, working conditions at the workplace, working and production methods, work equipment used in the work and the correct method of using it, as well as to safe working practices, especially before the beginning of a new job or task or a change in the work tasks, and before the introduction of new work equipment and new working or production methods.*
>
> *2. The employees are given instruction and guidance in order to eliminate the hazards and risks of the work and to avoid any hazard or risk from the work jeopardising safety and health.*
>
> *3. The employees are given instruction and guidance for adjustment, cleaning, maintenance and repair work as well as for disturbances and exceptional situations; and*
>
> *4. The instruction and guidance given to the employees is complemented, when necessary.”*

(Occupational Safety and Health Act 2002, 14 §)

3.7 Possible setbacks

There are a couple of common setbacks that can easily be found while searching the literature about orientation. The organization should do everything possible to prevent these setbacks.

3.7.1 Rush

Rush is one of the most usual reasons for the lack of orientation. The organization should agree on how much time is going to be used on the orientation, and count this in while scheduling other work tasks in order to prevent rush from being a setback. Going through the tasks with a new employee takes more time than just doing the task. When there then comes some acute tasks, the pressure might result in leaving the new employee aside. If this happens, the organization should think if it is possible to prioritize and plan the orientators time in a better way. On a longer sight, the new employee becomes a productive part of the organization, and the faster the orientation is done, the faster the orientator gets to continue with his own work. By delaying the learning, the orientator delays the day the new employee gets to start doing his/her own work as a productive member of the team. (Eklund 2018, 143-144)

The head of the organization needs to give a clear policy on how to arrange the orientation and the resources. This subject affects hugely on the new employees and the orientators commitment and thrive. (Eklund 2018, 144)

3.7.2 Lack of support

Supporting and creating a feeling of a safe work environment is one of the orientators main tasks. A new employee might feel a lot of excitement and joy while arriving at a new organization, but the new situation also tends to create uncertainty, fear, and anxiety which might lift the stress-levels. The change might also affect significantly on the new employee's free time and family-life which both can cause stress. At the same time, the new employee must learn a considerable number of new things and tasks, which take away much energy. (Eklund 2018, 145-146)

It is the orientators job to consider the stress-level of the new employee and help the newcomer to concentrate on the relevant subjects. Feeding new information constantly is never the most efficient way to teach someone. Patience and repetition are needed, but when the orientator can teach new information by linking it into something that has already been acknowledged, the information stays easier on the new employee's head. Although the orientation can not always be done according to the newcomer's hopes, paying attention to his/her needs strengthens the relationship and commitment to the organization. (Eklund 2018, 146-147) Also, the other team members play an essential role in making the new employee feel welcomed in the new job. If he/she does not get noticed or feels left out by the other team members, even the most excellent orientation strategies will not help the employee to feel good about the new position. (Hietala etc. 2017, 169)

3.7.3 Information overload

Sometimes the new employee is filled with too much information too soon. Everything is told at once, which no one can handle. It should be planned carefully how much and which kind of information is given at certain times. The schedule might also become too tight easily and be done based on other persons' tight calendars, which might collapse the whole orientation program right from the start. If the work is related to customers, the employee should be involved with the customers as soon as possible to get some real-life experience. (Hietala etc. 2017, 169-170)

3.7.4 Too organization-focused orientation

According to a study from Daniel Cable, Fransesca Gino and Brad Staats (2013, 6), an orientation process that emphasizes personal identities instead of the organization's own identity makes the orientation more efficient. Therefore, the orientation process should not be done highlighting the companies own ways and values but by letting the employee emphasize his/her own thoughts and strengths. The study showed, that encouraging the employees to own self-expression, concluded into a much better customer and employee satisfaction compared to the traditional approach. This also leads the employees to feel their job more meaningful and to thrive in their work, which increases the employee's cohesiveness, creativity, flexibility and effectiveness (Eklund 2018, 128-129).

To strengthen the personal identity, there are four phases that should be considered in the orientation process. Firstly, job descriptions should be thought differently, letting the employee work using his/her strengths and interests. Secondly, the employer should help the employee to find their strengths and each individuals' skills. The third phase is to create a work environment where everyone gets to know each other, and each' unique skill, so that the team knows how to use those. The final phase is for the employer to challenge the employee to think about ways to bring out these skills and develop them further in the daily work. (Eklund 2018, 129)

Even though we might know about how the orientation should be done, it is common that the practice is different from the theory. Many times, the newcomer is first told that the company appreciates initiatives and creativity, but then during the orientation process, a particular way of things to be done is told. (Kjelin & Kuusisto 2003, 39)

3.8 What more to know about orientation

3.8.1 Orientation programs

Orientation programs can be done for an individual or for a specific group. The extent of the program varies based on the needs but should contain at least learning objectives, subjects, schedule, tools, external material and the persons responsible for the orientation. The program is excellent for keeping track of the orientation and checking that the subjects that need to be learned have been handled with the new employee. (Kangas & Hämäläinen 2008, 6) When the orientation program is done once correctly, taking it into use is more comfortable and it becomes a general way of acting within the organization. Of course, it requires updating at times, but a well-done orientation program is easy to update whenever needed. (Joki 2018, 114) It is based on the same body for everyone and therefore guarantees that all the needed aspects are handled. A good orientation program also takes into account the new employees' skills and background. (Hietala etc. 2017, 161)

3.8.2 External material

Making external material takes time, but it will pay off later because the orientation itself gets easier. Programs like "welcome to the house" or "safety instructions" will help the employee to familiarize himself/herself with the organization even before arriving at the organization and the new employee can also revise material whenever he/she feels so. When producing these materials, it is vital to decide who updates them and how often. (Kangas & Hämäläinen 2008, 7)

3.9 The ABC for a successful orientation

- The quality of the orientation always starts from the management level, who needs to understand the orientation's importance and commit to improving it.
- The organization must take care of enough planning and resources for the whole orientation period. Distribution of the tasks and following the progress needs to be made clear for everyone who is involved with the orientation.
- The schedule for the orientation plan must be realistic with enough slots given for conversations, questions, rehearsing and structuring the information.
- Assigning the new employee with clear expectations and goals. It should include the works tasks as well as other ways of acting within the organization. The fears and insecurities of the new employee need to be handle also.
- The organization needs to encounter a new employee as an individual and listen to his/her needs and expectations.
- Keeping stress levels low and having enough time for recovery is crucial. The organization needs to offer the opportunity for the new employee to avoid too much mental pressure and give him/her respect and enough space to work in his/her natural ways.
- The organization needs to keep in mind that different employees have different sources of motivation. It is good to discuss these already while recruiting and consider the sources for motivation while making the orientation plan.
- Supporting the learning of a new employee is essential, but different people learn different ways. The organization should think about different ways to support different learners and adjust the orientation by the employee.
- Enabling the possibility to create relationships, becoming part of the team and building networks are all essential. Organizing occasions where new employees can meet different people help new employees to get more comfortable with the new work.
- As the new employee has a fresh way of thinking, from which the organization can benefit significantly, the organization needs to make sure that it has low barrier functional channels to give feedback. (Eklund 2018, 112-115)

4 Current state analysis

4.1 How the current orientation process is done

All the completely new employees, who arrive from outside of the company begin with a two-week orientation where they mainly learn about the company's values, the field of business and other common knowledge about the company. After this, the entirely new employees get to know daily banking services by following the workers in another team. Daily banking offers the most basic banking services. The orientation program continues with two weeks of Skype-orientation aimed only for the same new employees. In total, the company uses at minimum six weeks more to orientate a new employee from outside the company than an existing employee from the company's daily banking that has been assigned to a new role within the company. From this point onwards begins a half-day Skype-orientation, which takes between five to six weeks. During the interviews, it was discovered that the employees that were oriented in the spring went through six weeks of Skype-orientation, but later this orientation has been five weeks long.

When I interviewed a person involved in the developing of the orientation process for the financial advisors, the respondent expressed that ideally, there would be customer meeting experiences between each step of the orientation. Unfortunately, either this insight has not reached the offices or has not been possible to arrange due to the lack of time. The respondent was aware that the customer meetings between the steps did not happen in practice.

4.2 What works

In this section, I have detailed the main aspects that are functioning well at the company related to the orientation. Naturally, this is not an exhaustive list, but my focus has been on matters related to improving the current model for orienting new employees.

4.2.1 The organization knows what the employee needs to learn

The target company has a huge amount of knowledge in written form, PowerPoints and in human resources. New employees get enough information about the company, products, ways of working, etc. The company values and desired selling process alongside the necessary legislation and regulations are being taught very carefully and it seems that these aspects are being learned as well.

The company does a great job of gathering loads of information and embedding the most critical parts of it to the new employee. As an excellent example of this, one of the employees I interviewed had worked several years in sales before arriving at the target company. The respondent had previously learned a very aggressive approach towards selling, but now the mindset of this employee had changed completely. For this employee, it was clear that the right way of selling financial products was to be extremely discreet and gentle. This was opposite to how the respondent had previously approached selling.

4.2.2 Given time for the new employee

From the interviews, it became clear that the company is willing to give time for the orientation. The company is very patient with the learning curve and has no problem with the orientation process taking a long time. It does not force anyone to take customers before they are ready. This creates a feeling of comfort and security in a new employee.

When I started having the same kind of customer-meetings around eight years ago, the company was not that patient at all. Learning was supposed to be done with an employee that alongside his/her own work, would orientate the newcomer, but if the person was away then the newcomer would be left alone with the customer.

4.2.3 Hands-on-orientation

Hands-on-orientation has been very beneficial for new employees. The persons I interviewed about working as an orientator were clearly capable of managing the work. When the persons are good at what they do, the hands-on-orientation can be extremely effective. In my interviews, I noticed the same thing I had already seen in my work as an orientator previously: most of the learning happens through customer meetings and the hands-on-orientation is key for successful learning. The orientator plays a significant role in this, and therefore choosing the most suitable orientator and enabling this person with enough time for the work is critical. Fortunately, the target company is conducting a large part of the orientation within the offices, where the daily work takes place and most of the learning is happening.

4.2.4 A team that orientates through Skype is a great asset

Having a team that creates general orientation through Skype is extremely helpful for the offices, as this designated team consists of professionals with the best and most up-to-date knowledge. Even though it does not work nearly as efficiently as it should, it is a great resource for the company to have. A designated group of professionals teaching the work to each financial advisor that starts working in the company is something that many other firms would be envious of. All this valuable work is away from each offices' responsibilities and therefore enables the office to focus on other aspects of orienting than just teaching the theory.

4.2.5 Individuals are doing a remarkable job

From the interviews, I found evidence that the individual orientators have done a remarkable job considering the lack of support the current model has given them. The new employees mostly praised their orientators and it was apparent that at least most of them had created a strong bond with each other. The new employees trusted their orientators and acknowledged that they had done a lot for them in a challenging position. I also heard some great stories about what the superiors had done for the orientators or new employees in certain situations. However, it is important to note that I interviewed only three new employees and two orientators from the Helsinki metropolitan area. Therefore this is not necessarily reflective of the situation all over Finland.

4.3 What does not work?

In this chapter, I have gathered the most important findings of the problems with the current orientation.

4.3.1 Organizing the orientation

New employees feel like the orientation is not structured enough and they might be left on their own. Even though a half-day Skype-orientation should leave plenty of room to have own meetings or to follow the meetings conducted by others depending on the current skill level of the new employee, it turned out that the Skype-orientation tends to interfere with the other tasks in the schedule.

Problems arise when the new employee's daily schedule is not organized enough with the other teams' schedules. According to one of the new employees that I interviewed, the respondent was supposed to go follow someone else's meetings from the team after the Skype sessions. Still, often after the Skype orientation, it was already lunchtime. By the time lunch was over, often either the last or second last meeting was already taking place. When the meeting has already begun, it is not possible to interrupt it. This is neither polite or useful for the new employee. Hence, often, the new employee was left alone as he/she was not able to attend nearly as many meetings as planned.

Another new employee told me that his orientator was on sick leave for a month and the designated substitute only did six hours workday. Due to this, after the Skype-orientation and lunch, there was no time left for orientation with the substitute-orientator, especially since the orientator was usually very busy towards the end of the day. This new employee also felt left alone.

What these two stories tell me is that the problem is not with the timing of the lunch, the teams' meetings or in this case, even on the duration of the Skype-orientation. The problem is solely in lack of organizing. I got the feeling that it is not easy for the new employee to approach another employee and request to follow their meeting as this could bother the teammate. Why does the new employee even have to stress about these issues? Why has this vital part of the orientation (=organizing the hands-on-orientation) been left on the new employee's shoulders?

The following is a quote from an interviewee who works as a superior and used to work as an orientator:

> The problem is that the office-orientation is too uncontrolled. The orientators will not necessarily know which subjects to handle and in what ways. The learning is almost solely based on observations (when it should be mostly about practicing

> the work itself). The meetings are attended no matter what the subjects are, despite that it might not provide any concrete value. (The fifth interviewee)

4.3.2 Not enough support for the orientators

The superiors cannot solely focus on the orientators as they have to manage also all the other employees in the office, in addition to possibly managing several offices. This results in the orientators not necessarily receiving enough support. This sentiment was expressed to me in the interviews. The main problems I gathered from the interviews appeared to be with the lack of time and guidance and not enough education. In addition to this, some supportive material might be helpful for the orientators.

4.3.3 Skype-orientation does not reflect the daily work

It is hard to connect the Skype-orientation and the daily work seamlessly, as in real life, the cases that occur are much more complicated than the examples, and customer-meetings might be a lot different than what you originally think of them. Nevertheless, the cases that are being taught on Skype are not in any way connected to the next customer meetings that the newcomer will have. The Skype-orientation works on a pre-appointed schedule that likely has nothing to do with the daily meetings that the new employee will get involved with. Understandably it is not possible to teach the exact things on the Skype-orientation that the following meeting agendas will cover. However, in order to go from theory to practice, it would be important for the newcomers to have an opportunity to utilize the learnings within real meetings.

4.3.4 Skype-orientation is too long and intensive

Skype-orientation takes too long and should be divided into smaller parts. The Skype-orientations last a half-day each day for 5-6 weeks straight. As anyone can imagine, it is challenging to take in new information for hours and hours. Employees have much trouble in understanding and concentrating on what they are listening to as they have no real-life experience of the topics being thought. An interviewee told me that he believes that most of the new employees do not listen to the Skype-orientations basically at all. It is simply too much new information and nearly impossible to internalize when not having anything to reflect the information on.

A quote from an interviewee:

> The current way of orienting trusts too much on the employees' own activity. That the new employee is able to internalize and adopt a huge amount of information. At the same time, the meetings in practice are random, unorganized and are done according to the Skype-orientations schedule. (The fifth interviewee)

4.3.5 No networks are being built between the new employees or between the orientators

In any book about orientation, one can read about how significant peer support is. Still, even though there is a big group of new employees orienting themselves at the same time, the new employees that I interviewed had not built any networks between each other. When I asked more about this, the reason quickly became apparent. The Skype sessions are mostly done by just listening to the teachers, and while there are some small group assignments within the skype-orientation, it is not enough for the employees to get to know each other. Because the Skype-orientation is done without having any live interaction with each other, it is harder to get to know people. The same goes for orientators. The orientators I interviewed had not participated in any joint live nor Skype-meetings.

4.3.6 No written or pre-existing back-up-plans

The target company has come up with back-up-plans only as the situation arises. The rationale for this is that the back-up plan might collapse as well as the original plan, as explained in the first interview. Nevertheless, it would be good to have some pre-existing plan set as it might result in better planning. Not having a previously agreed-on plan might result in rushed decisions and sudden uncomfortable changes. Most people prefer to be prepared in advance. Change can be difficult to many and having information beforehand about a back-up-plan can help adjust to any possible changes.

4.3.7 Not clear enough responsibilities for the orientators

Responsibility within the current orientation model is an issue I struggled with and found rather confusing throughout my research. All of my interviewees told me that the superior is the one who at the end of the day is in charge of the orientation. This is precisely as it is supposed to be, as can also be read from the conceptual framework (chapter 3.2.3 Named Orientator) as well.

The orientators had varying experiences about the orientation role's effect on their own individual goals. One of the orientators told me that he/she has significantly fewer objectives than he/she originally had and the other one did not know that he/she would have any exemptions on objectives. I find that if the objectives relating to the original work remain the same and orientation is only a side task, then people might prioritize their own work over orientation. The more exemptions one gets from the original work, the more committed they are to the orientation.

Explaining the responsibilities of working as an orientator has not been totally successful either. Understandably when this way of orienting has only begun, it has not been possible to reflect on the process throughout the years and discuss ways to improve the setup. Nevertheless, the first orientators to work with this new model appear not to have received enough information about the task and therefore have not fully been informed of the new role.

In addition, it appears that responsibility for one's own training has been given without thoroughly explaining this first nor providing the required resources to do this. Finally, there are challenges with this apparent responsibility, as it is ultimately not the work task the employee was hired to work on. It is more about trusting in the individual's kindness and willing to put the new employee's needs ahead of his/her own.

4.3.8 Systems for the new employees are not working straightaway

One of my interviewees had to wait nearly two months before he had access to the programs that are needed for operating as a financial advisor. This is something that is not acceptable. In essence, the respondent was not able to do anything on his/her own but had to only follow the other teammates work. The respondent told me that others had experienced this as well, but in their cases, it has taken maybe a month at longest. The company needs to investigate the reasons behind such delays and fix this problem immediately. Not fixing the problem extends the training time and costs more money to the company.

As can be read from the Conceptual Framework, when a new employee arrives, it is extremely important to create a welcoming atmosphere where his/her arrival has been prepared for. This includes that all the needed permissions have been granted for the new employee. If this fails, it gives a bad, unorganized and dysfunctional picture of the firm and creates a lack of motivation within the newcomer.

4.3.9 Orientation takes too long

The interviews revealed that the orientation takes a lot more time than it used to with the previous orientation method that I was involved with. Obviously, the lack of proper organizing also plays a big part in this, but it should send a warning signal when an employee who has come to the company in December 2018 has not had any customer meetings by him/herself by May 2019. Not even together with the orientator, even though with the orientator, it should always be safe and possible to do so. It is taking much too long for the real work to begin in the orientation process.

5 Proposed action plan

5.1 Needs analysis

Based on the current state analysis, it is clear that the company has several significant challenges within its orientation. The company has the typical problem of the second stage (model orientation 3.3.2.), introduced by Kupias and Peltola. The general orientation is clearly too divided from the orientation to the work. The biggest problem is though with the lack of organizing, which creates several different smaller challenges. It is not impossible to fix these problems, but to fix these, the organization's focus needs to be a lot more on the orientation. So far, it has been done too sloppy, and it seems that the organization has not spent enough time organizing the whole structure of the orientation, but just some parts of it. This might also be a problem that occurs within more prominent companies because the different parts of the orientation do not communicate with each other (or know what the other parts are doing).

5.2 Proposition

In the Current State Analysis, I already mentioned the problems that I found in my research. The new employees' daily work is not structured enough, while at the same time, some of the supportive orientation, like common orientation for the new employees and the Skype-orientations are exact and thoroughly thought of. Unfortunately, the orientation done in them has failed to connect to the daily work. The overall focus of the orientation process thus far has been too much on teaching the knowledge (through skype-orientation) and too little on the hands-on-orientation, where most of the learning happens. The new employees felt that the learning happens when they get to the real meetings and especially when they get to do the work themselves. It is beneficial to have a separate team that teaches the theory because then everything does not have to be taught by the orientator or just by reading, but the Skype-orientation should support the daily work better. This can be done by focusing more on the hands-on-orientation part. At the moment, it has been left too unorganized, and therefore, the following actions should be done.

5.2.1 Skype-orientation to different parts with pauses in-between

Skype-orientation should be done more lightly by periodizing the orientation for a longer time. As written in the Conceptual framework, the orientation should be done in stages and give the employee a possibility to discuss the subjects with orientator or superior (Helsilä 2009, 49). If the skype orientation would be periodized to three different parts, for example, it would benefit the learner in multiple ways. The new employees' focus would remain easier and they would have the energy to concentrate on the subjects. Most of the benefits would come just from having more real-life experience on the handled subjects and therefore being able to understand the subjects easier. This is an easy way to make Skype-orientation a lot more efficient.

5.2.2 Customize the Skype-orientation

The Skype-orientation should also be more customized. At the moment, there is the same remote orientation for the employees with no background from the financial industry and for the ones that have worked within the organization for years and might even have some previous experience from the teachable subjects. Only the completely new employees that come from outside the company get a more extended orientation. That should continue as it is.

The skype-orientation could be done by the following **example**.

Within the first two weeks, some more general and simple information could be taught to all new financial advisors in Finland. The agenda for the two weeks would be available for the superior and the orientator in advance so that they could try to concentrate on these issues on the customer meetings. A more experienced advisor should also be able to decide not to join all of these Skypes if the orientator or superior, together with the employee, feels it is not useful. After the two weeks period, there would be intense hand-on-learning at the office.

The next two weeks of orientation would be done by two simultaneous skype-orientations that would be directed to different needs. The dividing could be done by different skill levels or by different areas, but the point in this would be that the two weeks agenda would again be available beforehand and the new employee alongside with his/her orientator (and/or superior) would choose to listen to the skype that they feel would benefit the learner the most.

Besides teaching new employees with different backgrounds, the whole country is also diverse. Working in the smaller cities, one might have real-estate-cases daily, while in the Helsinki metropolitan area, one might have a real-estate case once in two months. Of course, having online-meetings have changed this a bit, but the principles are still the same. It would be hugely beneficial if the skype-orientations could consider the individual's needs more and this is one way of improving it. Customizing the skype-learning to more specific needs, do require some more resources, but still, it should not be too hard or expensive to do it this way.

The next two weeks would be again about learning at the office, and then the last Skype that would last for one week could be perhaps for everyone again or continue with the same two-groups model, depending on what would eventually be taught on week three and four. After this, the hands-on-orientation would continue until the new employee is ready enough.

Of course, without knowing the actual schedule for the skype-orientations, it is hard to tell the exact recommendations of the time frame for each period or on teachable subjects. This example is more about the idea of periodizing and being able to customize the learning a bit more on skype-meetings.

5.2.3 Determine the new employees' daily schedule on a prior week

If the new employee follows the orientators meetings for the whole week, this is not an issue. Then it is already decided, and everyone knows what they are going to do next week. If the new employee is not with the orientator, then the people whose meetings he/she will follow and what kind of meetings these will be should be decided beforehand. Usually, the schedule is at least close to fully booked a week in advance, so this should not be a problem. Determining the calendar needs to be done with the orientator or superior to guarantee that the employee gets to be involved with the best possible meetings in order to advance the employee's development. This also guarantees that the employee does not have to feel like he/she is interfering with anyone’s day.

5.2.4 Organize the daily schedule in advance by switching the meetings

The meetings need to support the Skype-orientation and vice versa. At the moment, new employees take the meetings that are booked into their or their orientators calendar despite the agenda. I know from my own experience that the written agenda on the booking does not necessarily explain a lot from the meeting and it could turn out to be something totally different from what you originally thought. Still, it is a step in the right direction and would at least cause most of the meetings to be the “right ones”. It would help and fasten the learning if the meetings would be picked according to the specific needs and alongside with the skype-orientation instead of just letting them pop into the calendar randomly. The objective should be to start with more basic meetings and then develop from that.

It is quite common to change meetings. Usually, it just happens because of sickness. I would suggest that the whole company would change its way of acting so that already when booking a meeting, the customer serviceman would tell the customer that it is booked to a certain person, but it could be changed. If the customer wants explicitly to meet a specific person or they are in the middle of some subject that would require another meeting with the same person, then the customer serviceman would write it in the notes of the meeting. If the time is booked online by the customer, there would also pop-up a text that explains that the financial advisor might still change, and it would be confirmed in a text message a day before the meeting, which the customers usually get nevertheless.

5.2.5 No more individual goals, just team goals

Along with the changes above, a more significant change would also need to happen. This involves the whole organization and is not just about orientation, but it came up in the interviews I had. Individual goals should no longer be reviewed, but only team goals. In this way, there would no longer be competition for the meetings. As from what I heard from the interviews, some advisors do not want to let go off their meetings as they have their own goals that they should reach. If these goals would all be reviewed together as a team, we would not have this problem.

5.2.6 Specialization

Having only team goals would also make it possible for the teams to divide the responsibilities between each other and start focusing on each individual's personal skills. The benefits of specializing and customizing own job descriptions have been widely written and can also be found from the Conceptual Framework.

At first, I thought that this job description is so tight that it is not possible to personalize it in any way, but with the help of the interviewees, I came up with one way to specialize. Not everyone would have to sell insurances for instance, but the ones who are good at it and like it could focus on insurances. When one does do what he/she is good at, it motivates. I think all of the workers on a team should know how the different products work and be able to tell about them to the customer, but everyone has their interest in different fields of the financial industry. For example, I love to handle ASP-loans, and I know some of the advisors are not that comfortable with them. According to a successful Finnish Leader Matti Alahuhta, who has made a successful career in Nokia and Kone, the most crucial part of developing the personnel is to have the personnel in the right positions. When a person is in a position that interests him/her and which is the most suitable for the employee's potential and current development, the person grows as a worker, as well as a person, and creates better results for the company. (Alahuhta 2015, 149)

5.2.7 Make back-up-plans in prior

Having some thought on the backup-plans already in advance will pay the spent time back if something unexpected happens. With a proper back-up-plan, each person knows their role already in the case of an unplanned situation. Even in my interviews, there was a case where the orientator was on a month-long absence, and according to the new employee, the orientation did not progress during this time. This happened mostly because the back-up-orientator only did 80% work-day and therefore did not, have much mutual time after the Skype-orientations. I also understood that he/she was occupied with his/her own work and could not concentrate on the newcomer even with the time they would have had. Maybe if the back-up-plan had been agreed and informed throughout the unit, this would not have happened. Maybe they would have decided to choose some other back-up-orientator or transferred the new employee to some other office for instance. Now there was not any back-up-plan, and the decision was made probably on short notice, which resulted in a bad experience for the new employee and slowed down the time that the company could gain from their investment.

Also, there needs to be created a quicker way to get the rights to use the programs for the new employees if the systems will not work right away. The current problems with the right-issues are unacceptable. A way to fasten things up when problems occur needs to be agreed about.

5.2.8 Define the work and focus on choosing the right orientator

Although the orientators I interviewed were clearly the right pick for the job, that might not be the case everywhere around the country. According to what I heard from the interviews, the recruiting process should be more overall. The superior should go over all of the expectations, different roles, and responsibilities between the superior and the orientator. Orientation's effects on the current job need to be explained. Doubts that the potential orientator has must also be discussed and decide a way to overcome those. It could be that it is necessary to plan some additional education for the orientator or to name some other support person to any of the challenges that the orientator fears that his/her superior might not be able to help him/her with.

A written job description for the orientators is needed. It would clear out any confusion about the responsibilities between the orientator and the superior. Also, clear lines between the orientators typical job (as a financial advisor), and between the orientation, needs to be defined. When the work has a written job description, it is easy to claim that the orientator has a real responsibility for orienting. While at the moment, it is hard to define this big of a responsibility that is not written in the employee's job description. The lightened goals should be included within the job description as well, although it should be noted that these goals could vary a lot depending on the number of new employees and their progression.

Having experience of the orientation-team I worked in, one of the most helpful aspects of the work was to know that my part was not to achieve a certain amount of goals but to orientate the new employees as well as possible. With the current method, these are mixed. Just putting the new employee orientation officially on top of anything else, within the orientators job description, would give the orientator a relief of knowing that the focus is on the right things.

5.2.9 Better education for the orientators

Orientators that I interviewed had not been involved in any training after the orientation began. One of the interviewees got a good two weeks orientation from a former orientator before starting the job, but this is not the case every time. It was hoped during the interviews, and I agree with it, that it would be beneficial to give the orientators education on teaching, giving feedback, etc. before the orientation starts and regularly after that. The job requires a lot of psychological skills as the orientators need to decide when and how to appraise, comfort and when to push the new employee. Especially giving developing feedback is something that can be tricky and financial advisors are not trained to do it. It would be beneficial to teach about these.

5.2.10 Better networking for the new employees and the orientators

The company should create a network between new employees as well as between the orientators across the country. This could be done so that for example twice a year, there is some live-education for the orientators where they all meet. Then they could have a skype-meeting every two months in addition to this. This would bond the orientators together, and they could start asking questions and helping each other when problems occur.

The new employees should have more and larger tasks together within the Skype-orientation. This would help the employees to communicate more with each other and hopefully getting to no one and other. Still, without any live-interaction, they are probably a lot more hesitant to bond, so it would be good to start the Skype-orientation with, for example, a two-day live-orientation, where all the new employees would meet. After getting to see each other’s faces, it would be easier to activate them also within the group tasks. In addition, I suggest that a more significant group task is already given at the start of the orientation so that the new employees would form a group for the task already at the live meetings, which would “force” them to start interacting.

5.2.11 Start the practice as soon as possible

As told in the “4.3 What Does not Work” -section, it takes too much time before the new employees start having their own customer meetings. It might be because the orientators or the superiors are overprotective towards the employees or then afraid of lousy customer experiences; either way, it needs to speed up. The orientation process is taking a lot more time than it used to. The biggest reason, in my opinion, is that it takes so long before the new employees start to practice the work in practice by leading the customer meetings. This came up in all of the interviews I had, and none of the employees thought it would be a bad thing to start having the customer meetings sooner. One learns by doing, and with an orientator by the new employee's side, there is a backup that should be able to sort out even difficult cases and leave the customer satisfied. The learning curve would fasten up easily by just letting the new employees have their own customer meetings earlier. Matti Alahuhta claims that giving responsibilities is the best way of developing a person (Alahuhta 2015, 82).

In my own experience as long as the relationship between the orientator and the new employee is good, and they know each other well enough, the customer meetings can be handled by letting the new employee do most of the talking (depending a bit on the employees current knowledge) and then having the orientator to be involved whenever he/she knows or sees that the newcomer does not know how to answer the questions or tell about some things.

With proper knowledge about the new employee's skills and knowledge, the orientator can get involved in the meeting as much as needed without the customer even noticing that the other advisor does not know how to answer a question or does not know how to tell about something. Even if the customer would notice it, in my opinion, it would not matter because the customers do understand that people need to learn these things at some point, and as long as they get their errands handled with a professional, that is all that matters. These things require trust and need to be discussed between the orientator and the new employee before the customer meetings.

5.2.12 Create a supportive channel for the orientators

A well-organized orientation at work is a backbone that will provide a much more supportive atmosphere. Still, besides that, to make sure that the orientators will get the support that they need, the company should designate a person who helps them when their own offices superior is not available. This is mostly a problem with bigger offices or offices that have a shared superior. Still, this would also help in cases where extra help is needed with some specified orientation challenge that might not be the superior's specific know-how. The support person could have example monthly Skypes for all the orientators and would be reachable through telephone, but would also visit the orientators from time to time and that way become trusted support that would be easy to reach. It is hard to say how many orientations support persons would be needed and how much work it would require. I suggest starting by perhaps naming someone from the current orientation development team (or sign a new person there), who would do this alongside with the developmental work.

5.2.13 Quality of the orientation to the top priorities

Orientation needs to be prioritized among the top priorities of the organization. From the interviews, I got many examples where, because of hurry or lack of organizing (=hurry?) there was no time to go with the original plan, or the new employee felt left alone. When starting in a new company, support is needed a lot, especially when a person comes from a different industry and concretely everything is new. The company can get far with a proper structure and by creating a general feeling of caring for the new employee. This feeling has been widely lost within the Case organization.

It can still be changed by creating a more **structured orientation process**, where the **new employee** has **pre-agreed meetings** to attend to, that **follows the agenda of the Skype-learnings,** as long as the **orientators** are being **adequately trained, supported** and given **clear responsibilities** with the liberty to **prioritize orientation** before any other goals. This should improve the new employees' experience, decrease significantly the time that is being used into one person's orientation and create profit for the company as well.

I have done this plan keeping in mind that the proposition is for the whole of Finland. I have not suggested bringing back an orientation team that just orientates, as it is financially really challenging to get an orientation team like that to the whole country. Especially when not all the areas in Finland constantly hire new employees and the distances between different areas might get long. Of course, the proposition 5.2.8 "Define the Work and Focus on Choosing the Right Orientator" could as well include forming several orientation teams across the country if the company chooses to do so, but as I doubt there will be enough resources, I have made the plan without any proposition as such. Just recently, a pilot launched in Espoo, where an orientation team was formed that only focuses on orienting. I had the possibility to work as one of the orientators. If the pilot is successful, the team will get to continue, and the model has a chance to spread throughout Finland (at least in the largest cities). I believe the pilot is an excellent start, but still, all the propositions are well-grounded and need to be acknowledged.

6 Validation

6.1 How the validation was done

I sent the chapters 4*.2 What works*, 4*.3 What does not work* and *5.2 Proposition* to a person from the orientation development team in order to get validation for the proposition. The same person has been planning and reporting about the orientation team pilot I worked within. I was able to get feedback and validation from the respondent to all of the thirteen development ideas.

6.2 Testing and implementing

Although the company has started to pilot a new orientation department, most of the development ideas I created could not be tested in practice, but fortunately, I was able to test at least some of them. In this chapter, I will go through the feedback that validated my work and I will also give my point of view either from my experience of testing the step or as an expert in the field.

6.2.1 Skype-orientation to different parts with pauses in-between

This development idea has already been done. Starting from this autumn, the new financial advisors have not had to go through as intensive Skype-learning as prior. The Skype-learning was separated into two different parts so that there is two weeks' pause in-between. I have noticed in my work as an orientator that the Skypes give the worker an excellent foundation on all the different areas of the work. They will not teach the subjects efficiently, but they will leave a mark on the memory so that when a situation occurs in a customer meeting, it will ring a bell, and the new employee will at least remember that there was something that should be remembered on the subject. This prevents giving the customer false information on promises that can not be kept.

6.2.2 Customize the Skype-orientation

According to the feedback, the plan is good, but the challenge is on how to get the new advisors divided according to their skill levels and are there enough new employees so that two different Skype-orientations would be worth arranging.

Indeed, there might not always be so many new employees even around Finland, but at least when there are, this could still be considered. The only way to determine the skill-level well enough is to make some proper additional material to determine the skills and to get to know the employee.

With one of the employees, I got to utilize the possibility to choose which agendas from the Skype-orientation I thought were useful for the employee. The employee was a former financial advisor, returning from maternity leave, so it made sense to choose the Skypes. This proved to work well, as the subjects were very familiar to the employee, and we could use the time for having customer meetings instead.

6.2.3 Determine the new employees' daily schedule on a prior week

I have been able to test this already in the orientation team pilot. I have scheduled the trainees' all the meetings on a prior week, and this has proved to be an outstanding practice. Scheduling has given the trainees' certainty, provided much more systematicity and the training have also become more efficient when everyone knows where to be at certain times. Also, the feedback I got supported this, it just stated that it requires commitment and proper planning from the superior. When I have done it, it has taken almost two hours to organize the calendar for six employees, so it still takes quite a lot of time. This is because I have needed to make sure that one orientator is available in each meeting (although depending on the development of the new employee) and all the employees should get approximately the same number of meetings each week.

The feedback approves the step, but also notes that this requires commitment and planning from the superior, just like I have been able to notice myself.

6.2.4 Organize the daily schedule in advance by switching the meetings

I have also been able to test this step. I have implemented this so that I have picked “the right” meetings from the area’s calendars, especially from the nearby team. I have asked for their permission, and mostly, they have just been happy that their calendar gets a bit lighter. I have also opened the calendar for two of the most experienced trainees. From their calendar, I have then been able to pick the more uncomplicated cases and moved them to the newer employees. In addition to this, when necessary (=the orientators are fully booked), I have used the nearby team as an orientator so that I have not just put the trainees to watch their customer-meetings, but also to be there behind the trainee, while the trainees take their customers. This is again beneficially to all as it gives the new employee more experience and takes away some work from the other team. All of this has worked truly well and provided the systematicity needed.

The feedback validates this as a good proposal.

6.2.5 No more individual goals, just team goals

This could not have been tested, but according to the feedback I got, this would create more teamwork and eagerness to help the new employee. Still, I do not see this happening anytime soon.

6.2.6 Specialization

This could not have been tested either. According to the feedback, this would be beneficial, and the team goals would bring not just well-being at wor, but also results. Then again, to a person’s development, a person must always go over his/her comfort area.

6.2.7 Make back-up plans in prior

According to the feedback I got, this is definitely a good observation. It would need someone to coordinate this and probably ready-made guidance. During the time I have worked as an orientator, we have not gotten into any problematic situations, where back-up plans would have been needed. The new employees have been absent for a couple of days, but it has been easy just to transfer the meeting to another trainee. Problems would occur, though, if an orientator is absent at the beginning of the trainee period. At least in the case of the orientator being absent and for more prolonged absences in general, guidance would be needed.

Also, within this time I have worked as an orientator now; there have been problems with the programs not working. In addition to resolving the rights issues faster, the computers given to the employees should be pre-tested and updated before the employees get them.

6.2.8 Define the work and focus on choosing the right orientator

Prioritizing the orientation does a lot. Because we have been able to focus on the orientation in the orientation team pilot, we have at all times been able to support our trainees and they know that we are there for them.

The feedback focuses on confirming the importance of the subject. The goals should be given according to the role of an orientator and the work should be defined to the ones that orientate continuously.

6.2.9 Better education for the orientators

Also, the education for the orientators has been available since spring. I got feedback that education is supposed to inform about the training of the new employee and the orientators are supposed to consider that when orienting. The team has come to the conclusion that the orientation quality varies, and the orientators must get the same education as the new financial advisors. Giving feedback would be necessary to also include within education.

6.2.10 Better networking for the new employees and the orientators

Also, the respondent acknowledged that it would be good to have a physical meeting for the new financial advisors and then continue the relationship through Skype, for example. Always when the Skype-meetings begin, some groups are being made. Still, this has not worked in networking so far, according to my interviews; the physical meetings might change that. The orientators should be able to network better now through the training.

6.2.11 Start the practice as soon as possible

This we have tested. All the employees I have worked with, within the last two months have started to take the customer meetings themselves at the latest on their second week. This has proved to be the quickest way to learn and to prevent unnecessarily fears towards the work. For example, one of the workers I oriented had previously been watching other customer meetings for two months without taking any customers by him/herself. The employee had been on a one-month holiday before coming to the orientation team pilot, but I put the newcomer in charge of a meeting on the second day.

Also the respondent feels that this is the way to do the orientation. The person who orientates should enjoy the work and be committed to developing another person. A firm trust is necessary, and learning comes from doing and taking responsibility.

6.2.12 Create a supportive channel for the orientators

The respondent wrote that this had been thought of already, but as the organization has some supportive channels for the financial advisors already, this might not be needed enough. The scale of different questions that might occur from the financial sector is also massive, and therefore, it is hard to pick a person for this. The respondent suggests that a group of well-picked persons might work if their own goals would not become a problem. Orientators could perhaps form this group.

As I have now worked for a brief while as an orientation within this pilot, I have felt that the responsibility, trust, and power to make decisions by ourselves have been much more critical than any supportive channel. Still, I believe it would be helpful if there would be a named person for only orientation related problems. One would not turn towards this person to ask questions about the daily work, but about the orientation.

6.2.13 Quality of the orientation to the top priorities

The orientation has been a priority within one team in the whole country for a couple of months now, and it has improved the satisfaction of the new employees significantly, and the skills have improved a lot faster than with the “regular” model. For example, a new employee that I interviewed to this thesis said to my last interviewee that the real learning happened after this pilot had started. The person had been in the company for six months before that, and most of the learning happened after that.

According to the feedback from the person who is planning the orientation, putting the quality of orientation to the top of priorities is the core of the whole orientation planning. There needs to be a clear plan that the superior and the orientator follow. The new employee must feel that his/her development is important and that is where the focus is.

7 Conclusions

7.1 The goal of the thesis

The goal of the thesis was to create a development plan for the current orientation process. The plan was supposed to be built based on the research on literature and especially on the findings from the interviews. I anticipated that the way of orienting is not working at the moment, but I did not know how severely weakened the process was when I started the interviews.

I knew right from the beginning that I will not be creating anything completely new, but that I will try to find out several different ways to make different sizes of improvements to the current process. I had not planned any number for the proposed improvements but hoped to find at least 8-10 of them.

Before the interviews, I knew I wanted to search for answers on ways to improve the use of Skype-orientations. I also wanted to find out ways to customize the work as well as connecting the different parts within the orientation closer together to create a well-structured and organized orientation. In addition to these, I wanted to provide more time for the orientator and have clear responsibilities between the orientator and the superior.

7.2 Results

As a result of the goals listed at the end of the previous chapter, I ended up creating at least one solution for each of the goals. Three of the developmental suggestions (5.2.1, 5.2.2 & 5.2.4) involved Skype-orientation, and the first of them even got taken into use without me affecting it. Two of the ideas (5.2.5 & 5.2.6) involved the work's customization. Still, I feel that this subject was left on a smaller note because it is more about the work itself and not as much about orientation as the other subjects. Also, neither of the ideas could be tested. Only the idea of organizing the daily schedule in advance (5.2.4) was clearly putting the different parts of the orientation closer together. Although in a beneficial way. Also, just one of the ideas (5.2.8) was explicitly providing more time for the orientator or clearing out the responsibilities between the orientator and the superior. Many of the development ideas though do support these subjects (5.2.9, 5.2.12 & 5.2.13). All of the ideas are someway creating a structure on the orientation and therefore provide a more organized orientation.

Although I could not have known what the result would be. The result looks a lot what I would have predicted. I was able to gather quite simple solutions that would improve the current orientation process significantly. All of the thirteen development suggestions got positive feedback and were at least doable. A couple of the suggestions had already been made by the company, while a couple would need some extra pondering on how to do them. The suggested developments that had been already taken into use, even without me proposing them yet, can be seen as a prove straightaway, that they have been decent propositions.

I was able to test several of the suggestions myself while orienting new financial advisors as a full-time orientator. Each one of the tested development ideas has been widely beneficial. They have clarified the orientation process and made it more organized and professional. During the test period, we got some excellent customer feedback sent straight to the superiors. It is not common that such new advisors get that good feedback. Employee satisfaction has been much better according to all the discussions and interviews that my last interviewee and I have had with the new employees. When on top of this money is being saved as the employees start to work on their own a lot faster and have even thus far created better sales results than an average financial advisor, there should not be any doubt that these development plans work, and a proper orientation benefits the company.

7.3 Summary and where to go from here

I started the project thinking that the target company would not take back the old orientation model, where I had already worked in. However, now it seems that there is a substantial possibility of not just taking it back, but to even getting a more developed model of it by having an external Skype-orientation team, which teaches the theory. The hands-on-orientation would happen in offices by full-time orientators. Although my plan works even without having a couple of workers to become full-time orientators, it is easier for the orientators when the work is that visibly separated from the financial advisor's work.

The company has started to take steps towards the right direction on the subject of orientation. The orientation process is being under review at the moment, and I have been able to impact on how the future orientation should look like. I have trust that many of these suggestions will become a way of orienting within the target company.

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