Developing orientation in the invoicing department
and producing a work instruction manual

Case: Shared Service Centre

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ABSTRACT

The first objective of this thesis was to research the orientation of new employees in the commissioning organization Shared Service Centre and to provide improvement suggestions for the process based on the findings. The second objective was to produce a comprehensive work instruction manual for the flow-through invoicing team of Kesko Food. A request for making a work instruction manual came from the team leader of the corresponding team as there was no coherent instruction manual available.

Orientation is the process of familiarizing a new employee with the workplace, his/her tasks and policies of the organization. The main objective of orientation is to ensure that the new employee adapts to the work environment and is able to work independently according to the company’s standards. Increasing job satisfaction and ensuring work safety are other important objectives of orientation programs.

The theory of orientation was studied as a background for the research. In addition, selected employees were interviewed and a personnel survey was conducted for the employees of invoicing department. As a result, a work instruction manual and orientation checklists for the use of the commissioning organization were produced. Additional recommendations on how to develop orientation in the future were formulated based on the research.

Keywords  orientation, job guidance, work instruction manual, invoicing, SAP

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TIIVISTELMÄ

Tämän työn ensimmäinen tavoite oli tutkia uusien työntekijöiden perehdytystä toimeksiantajarytmityksessä K-talouspalvelukeskuksessa ja muodostaa tutkimuksen tulosten perusteella kehitysehdotuksia nykyiseen perehdytystprosessiin. Työn toinen tavoite oli tuottaa kattava työohje Ruokakeskon tehdaslaskutukseen. Ehdotus työohjeen tekemiseen tuli tehdaslaskutustiimin esimiehillä, koska työohjetta ei ole ollut.

Perehdytys tarkoittaa uuden työntekijän tutustuttamista työpaikkaan, hänen työtehtäviinsä ja yrityksen menettelytapoihin. Perehdytyksen pääasiallinen tavoite on varmistaa uuden työntekijän sopeutuminen työympäristöön ja kyky itsenäiseen, yrityksen standardien mukaiseen työskentelyyn. Työtyyvyysyvällä lisääminen ja työturvallisuuden varmistaminen ovat perehdytystohjelmien muita tärkeitä tavoitteita.


Avainsanat  perehdytys, työhönopastus, työohje, laskutus, SAP

Sivut  50 s. + liitteet 6 s. 

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1 INTRODUCTION

1.1 Background of the commissioner: Shared Service Centre

Shared Service Centre (K-talouspalvelukeskus Oy) is a subsidiary of Kesko Corporation, one of the leading retail store chains in Finland. Kesko operates in the food, home and speciality goods, building and home improvement, and car and machinery trade sectors and it employees approximately 45000 people. Kesko has stated their vision as follows: “Kesko is the leading provider of trading sector services and a highly valued listed company.” (Kesko in brief, 2012)

Shared Service Centre (SSC) has operated as independent company since 1.1.2009. Between the years 2002 and 2009 Kesko Food had centralized financial services in Tampere, but did not yet operate as a separate company. SSC provides a variety of financial services to its customers and it consists of the following departments: Invoicing, Fixed Assets, Accounts Payables, Accounts Receivables, Master Data, Other Financial Services and Report to Record. (Perehdyskansio, 2012, 5.) The mission of Shared Service Centre is to provide financial services to its customer companies efficiently and reliably. Shared Service Centre is one of the largest service centres in Finland. Their key competence is that the processes are implemented and monitored with flexibility, efficiency and coherently. (Kesät info 2012, 9-12.)

Shared Service Centre has 26 customer organizations. The main customers are Kesko Food (includes Kespro Oy and Keslog Oy), Rautakesko Oy, K-citymarket Oy Intersport Finland Oy, Musta Pörssí Oy, Kenkäkesko Oy, Indoor Group Oy, Insofa Oy, Johaston Oy, Kesko Oyj, Konekesko Oy and K-institutti Oy. In addition to these, SSC has several smaller customers for instance from retail sector. (SSC yleisesittely 2012, 2.) Shared Service Centre aims for constant improvement and intensification of the services, which is enabled through standardization and harmonisation of the processes and supporting information systems (Kesät Info 2012, 8).

In 2012, the number of employees in Shared Service Centre was 230 (including summer workers) and the amount of managers was 23 (Kesät info 2012, 12). The volume of processed invoices during the past year was approximately 6,3 million. In the agenda for the current fiscal year was developing the Service level agreements (SLA) and attaching them to the customer contracts. The SLA includes for example agreed objects for certain indicators such as costs per invoice, processed invoices per hour and acceptable delay. Each month, a report that compares the actual results in relation to agreed objectives is created. The reports are introduced to the corresponding customer organization quarterly. (SSC yleisesittely 2012, 5.)
1.1.1 Structure of the Organization

The organizational chart of Shared Service Centre (Figure 1) gives a clear picture of the departments, the key actors in the organization and their connection with each other. Managing Director is the link between the Project Director and the Hub Leader. (Hub means the Service Centre site, in this context Tampere.) Key Account Managers are responsible for the customer relationships of all of the departments, whereas all departments have their own Financial Service Manager (FSM) and Process Owner (PO).

Figure 1  SSC Organizational Chart (SSC Yleiskatsaus 2012)
Process Development Manager (PDM) and Process Owners (POs) are responsible for the development of the economic processes. PDM takes care of inletting standardization. He/she controls the commissioning of new policies both in the Shared Service Centre as well as within the economic processes of the customer organizations. On top of these actions, the PDM presents suggestions of changes and development to the Process Development Board. Each department in SSC has their own Process Owner (PO) who monitors and measures the processes. His/her responsibility is to identify development possibilities within the organization. Based on the observations, results of the processes and development suggestions gained from other parties, the Process Owner presents development proposals. His/her responsibility is also to ensure that the changes are implemented according to the decisions within the whole organization. (SSC yleisesitelly 2012, 10.)

Finance Service Managers (FSMs) have the following areas of responsibility: quality and timeframe, human resource issues and following the process standards. In more detail, the first point “quality and timeframe” means that the FSM controls that the quality requirements are met and the agreed timeframes are followed in the service delivery. FSM is also responsible that the amount of employees is accurate and ensuring that sufficient level of skills is maintained in his/her department. This involves a proper training of new employees and developing the skills of all employees continuously. In addition, FSM is responsible that the specified financial process standards of Kesko are followed and the processes are adjusted based on local requirements. (SSC yleisesitelly 2012, 8)

Key Account Managers (KAMs) are the contact persons between the customer and SSC. Their responsibilities relate to maintaining good customer relationship and ensuring that the service level and quality meets the promised standards according to the Service Level Agreement. They are continuously in contact with the customers and inform them about current situation. KAMs arrange meetings with the customers and the customer can contact them directly in case they do not know whom in SSC to contact in relation to certain issue. This means that the customers are not exclusively in contact with the KAM, but he/she is the link to the organization. The KAM also monitors the processes and optimizes them together with the customer, the Process Owners and the Financial Service Managers. (SSC yleisesitelly 2012, 11.)

1.1.2 Invoicing

This thesis concentrates on the development of the orientation process in flow-through invoicing department of Kesko Food. In the beginning, one should have an understanding about the invoicing department in the commissioning organization and knowledge about the invoicing processes. In this chapter, the invoicing process in the Shared Service Centre is looked at in more detail.
The invoices are received through three different channels: in paper form, as e-invoices and scanned invoices. In the researched team, e-invoices and scanned invoices are both available in the SAP system once the employee begins to process the data and the handling of these two types of invoices is very similar. The small difference is that scanned invoices are first sent to an outsourced scanning company, located in Salo, and from where the invoices are scanned to Kesko’s centralized information system. The e-invoices are sent directly from the supplier to Kesko’s IT-system in electronic form. The organization is aiming to reduce the amount of paper invoices to the minimum because handling of them is the most time-consuming and consequently least efficient process. In the future, the plan is to abrogate all invoices sent in paper form via post-delivery and advice the customers to send them in electronic form instead. There will be some handling of paper invoices in the future as well, because some of the customers are small companies and their volume is low. Therefore, they do not have the possibility to send the electronic material due to lack of resources.

Flow-through invoicing is the invoicing process where the products are delivered directly from the supplier to the customer but the invoicing is organized through Kesko (Shared Service Centre). In SSC, the invoices are recorded to the SAP system. When the data is input, the system creates purchase and sales invoices and makes a record to the bookkeeping of Kesko. Once the handler of the invoice has checked and then saved the data, the sales invoice is forwarded to the customer’s corresponding system automatically in electronic form. The service is charged by the agreed invoicing compensation that is included in each invoice. The compensation margin is agreed with each customer when making the service agreement. Other benefits of flow-through invoicing for Kesko are the interest profits and improved purchase agreements for the whole K-group. (Invoicing 2011, 3.)

1.1.3 Employees responsibilities in the Invoicing department

In order to understand what should be included in the orientation of new employees, the job-description and responsibilities of the employees in the invoicing department need to be defined. The following description is compiled based on the authors experience gained through working in the invoicing department and discussions with the supervisor of the researched team. The daily operations in the invoicing department are the handling of the invoices and checking the input material. On top of the regular invoices, interest notes and reminders should be dealt with efficiently. Dealing with possible complaints and making corrections when required are also important tasks. This is done when problems occur and in the researched team, it is a weekly but not a daily activity. Also updating information to the database when changes are informed (e.g. changes in the ownership of the stores) is part of the employees’ tasks. On top of these, other basic office work such as mailing and filing documents is part of the daily activities. All in all, the primary task is to input the invoices to the SAP-system efficiently, yet flawlessly, and make sure that the delay is kept on minimum.
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The employees in the invoicing department, who input the invoices to the system, are responsible that all data is transferred correctly and that Kesko gets the agreed compensation for each invoice. The compensation brings the main profit for the organization and it is a requisite for profitable operations. Therefore, it is extremely important for the employees to make sure that the customers pay the agreed compensation percentage for each invoice. One of the time-consuming tasks is monitoring of insufficient invoice material. In case there are any lacks in the invoices, the employee contacts the supplier and requires corrections for the material. In addition, in case there is anything unclear with the material that is likely to cause errors it should be checked from the supplier instead of making own conclusions. Thus, communication with the suppliers is part of the employees’ responsibilities. Naturally, any incomplete or incorrect material is not accepted. Even though the optimal target is zero defects in the processing of invoices, mistakes sometimes happen for everyone. In case the mistake has happened in the process within SSC and noticed when checking the material, the corresponding employee makes required corrections manually. (Invoicing 2011, 3.)

1.2 SAP AG: company overview

SAP AG is the leading provider of enterprise applications and it operates worldwide having customers in over 120 countries. It was founded in 1972 in Mannheim, Germany by five IBM employees as Systemanalyse und Programmentwicklung (“System Analysis and Program Development”). Currently it is the third biggest independent manufacturer of software in the world. SAP AG has a 40-year long history of innovation and is aiming for continuous growth. The company employs over 55 thousand people in more than 130 countries. (SAP at a glance: business overview.) SAP provides customized software solutions for the companies’ business operations and it has applications for several business fields. It has developed own solutions for retail sector, healthcare, banking, public sector, automotive, mining and many other industries. (SAP industries.) For SAP Finland, Kesko is one of the largest customer organizations along with Nokia, StoraEnso and SanomaWSOY (SAP Finland: SAP Nordic and Baltia).

SAP states its mission as follows: “Our mission is to help every customer become a best-run business. We do this by delivering new technology innovations without disruptions: enterprise mobility will transform consumption of IT; in-memory technology will simplify the IT stack and drive high value applications; and the cloud delivery of IT solutions will become mainstream. By leveraging our strong base in applications and analytics as well as new technology innovations, we can offer solutions that make our customers run better. To help our customers derive value from their SAP solutions in a fast, cost-effective and predictable way, we also provide professional services and support.” (SAP AT A GLANCE Capital Market Information 2012.)
1.2.1 SAP ERP

As other ERP (enterprise resource planning) systems, SAP ERP is a solution for integrating business functions into one platform. The processes can be aligned together and real-time information shared across the organization within and outside of the business network. The comprehensive information from finance, human resources, marketing, manufacturing and other departments of the organization can be integrated in the most suitable combination to meet the companies’ needs and requirements. (SAP lines of business 2012)

1.2.2 SAP in Shared Service Centre

In Shared Service Centre, the operated SAP solution is SAP R/3 that is a tool used in daily operations in all of the departments. It is utilized in the invoicing, accounting and all other financial service processes. All important data related to the customers and suppliers is maintained in the system. In SSC, the SAP applications are customized to serve the specific needs of the financial and accounting operations. As stated in the previous subchapter, the potential capacity of SAP is much wider but for the effective utilization of the software, the customization is done to meet the specific needs of Shared Service Centre. All employees of SSC use the SAP system daily in the operations but depending on their responsibility areas, the employees utilize different transactions and applications of the system. In invoicing department of SSC, there are in total four different SAP platforms developed based on the special needs of customer organizations. The basic functions are the same despite the platform but specific customer data can be found only in the corresponding application. For example in the researched team, invoicing of Kesko Food, the SAP platform used is called SAPUSKA. In invoicing department, the employees use SAP for all stages of invoice processing: inputting data, searching customer information such as customer codes, looking for information about the suppliers, and checking, completing and correcting the input material. For invoicing, only couple of transactions are used daily but the system contains several more transactions that are required in certain tasks. SAP is the most important tool in the processes but not the only application used. Also other supporting systems are utilized in the operations, most of which are internet based.

The employees of different departments can access the specific material required in their work. The accessibility in the system is limited so that not all information is available for everyone. This is done in order to clarify the daily operations and to avoid any mistakes that could be caused by someone accessing and changing data out of his/her responsibility area. The fact that employees have limited permission in the system requires that the members of different departments are in close cooperation with each other. For example, the persons handling the invoices do not have the authority to change any customer data in the system. Hence, in case an invoice does not go through the system due to lacks in the customer data, the employee needs to contact someone in the Master data department and request to update the information.
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1.3 Occupational Safety and Health Act

The need for sufficient orientation is governed by the Finnish law and employers need to be aware of the relating regulations when planning and implementing the orientation programs. The following two paragraphs are quotations of the Occupational Safety and Health Act 738/2002.

“The objectives of this Act are to improve the working environment and working conditions in order to ensure and maintain the working capacity of employees as well as to prevent occupational accidents and diseases and eliminate other hazards from work and the working environment to the physical and mental health, hereinafter referred to as health, of employees.” (TTurvL 738/2002 1:1§.)

“Section 14 – Instruction and guidance to be provided for employees
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 jeopardizing 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.” (TTurvL 738/2002 14:1-4§.)

Part of the orientation process and the preparations before the employee starts is to ensure that the employee has adequate workstation and necessary supplies. Partly this is done in accordance to appropriate work practices and ensuring wellbeing and comfortability of the employee. However, the employer should be aware that the ergonomic aspect of the proper work conditions is also regulated by the Finnish law:

“Section 24 – Ergonomics of the workstation, work postures and work motions
(1) The structures of a workstation and the work equipment used at work shall be chosen, designed and placed in an ergonomically appropriate way taking the nature of the work and the employee’s capacities into consideration. As far as possible, the structures shall be adjustable and allow for flexible arrangement and have such operating qualities that the work can be done without causing a harmful or hazardous load on the employee’s health.” (TTurvL 738/2002 24:1§.)
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The main concentration of the Occupational Safety and Health Act is on the employers’ obligations and responsibilities, but also the employees’ obligations are governed by the Finnish law. Where the employer is obligated to provide sufficient instruction and guidance, the employee is obligated to follow the given instructions and contribute in the maintenance of safe work environment. The law does point out that the employees’ obligations are in relation to their experience and competence. Based on this statement it is the employers’ responsibility to make sure that the employees’ skill-level corresponds with the assigned tasks and given instructions. The issue is covered in the Occupational Safety and Health Act as follows:

“Section 18 – Employees’ general obligations
(1) Employees shall follow the orders and instructions given by the employer within his or her competence. Employees shall also otherwise observe such order and cleanliness as well as care and caution that is necessary for maintaining safety and health necessitated by the work and working conditions.
(2) Employees shall also, in accordance with their experience as well as the instruction and guidance provided by the employer and according to their occupational skills, by available means take care of both their own and the other employees’ safety and health.
(3) Employees shall avoid such harassment and other inappropriate treatment of other employees at the workplace which causes hazards or risks to their safety or health.” (TTurvL 738/2002 18:1-3§.)
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1.4 About the research

1.4.1 Research Question and background of the research

The research question of this thesis is: “How to develop the orientation of new employees in the invoicing department of Shared Service Centre?” The research is conducted in the Shared Service Centre of Kesko Corporation. The thesis concentrates especially on the flow-through invoicing of Kesko Food because the request for the research has become from the team in specific. The need for this research has arisen from the authors' own experiences when working in the department, based on discussions related to the topic in the team meetings and a request from the supervisor of the researched team. Because of the research there will be suggestions for improving the overall orientation process in invoicing department and a work instruction manual that contains the instructions for work tasks of the commissioning team. The manual will be used in the orientation process for new employees and as a tool in the daily operations of the team for all employees.

1.4.2 Research Objectives

The primary objective of this thesis is to create a comprehensive manual for the flow-through invoicing team of Kesko Food. The organization's general policy is that each team should have a manual that contains all instructions related to the processes and daily operations. For the researched team, there is currently no manual available so the need for the manual is explicit. The objective is that once the manual is implemented, it will improve the orientation of new employees and make their learning of the processes easier and more effective. The manual will be beneficial for current employees as well, because it will contain detailed instructions for all processes and transactions. The aim is to create well-structured, clear instructions that are easy to follow and understand. The manual will be structured in such way that the employees can easily find specific instructions for certain process that they need support for. For creating such manual, the author needs to get familiar with the common guidelines of the organization for creating instructions and the existing manuals of other teams. The processes will be gone through with the current employees and the supervisor of the team to make sure that all important information is covered accurately and precisely.

Another objective is to provide improvement suggestions to the overall orientation process of the team based on the research. These recommendations will be useable not only in the researched team, but in the whole invoicing department and other departments of Shared Service Centre. The basis for the research is built up by studying the theoretical background of orientation. After studying the theory and having an understanding of how an effective orientation process should be like, the author conducts interviews and a personnel survey to gain information and understanding about the current situation in the organization. Based on the interview results, beneficial recommendations can be formulated.
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1.4.3 Research Methods

The first research method of this thesis is studying the theoretical background of orientation carefully for enabling a comprehensive analysis of the orientation process in Shared Service Centre. Background for the research conducted in the commissioning organization is gained by understanding the theoretical aspects of orientation. Besides the orientation theory, the invoicing processes of the commissioning team will be studied in order to create a comprehensive, detailed manual for the processes. This is done by discussing with the current employees and the supervisor of the team, who have the best expertise of the operations, and researching the company’s internal material and instructions.

Another research method is conducting interviews as a tool of qualitative research in order to understand the current situation of the department and find out the subjects of development. The interviews will be conducted for selected employees in the flow-through invoicing team, two former members of the team and the team leader. The interviewed employees are selected based on their expertise and experience in the team. All of the interviewed employees have worked or currently work in the commissioning team and they have understanding about the process. Purpose of the selection is to gain different viewpoints for the research. One of the interviewees has recently started in the department and has recent personal experience about the orientation. Another interviewee has worked in the team for five years and can provide insights about changes and development in the operations and management of the team during the years. Two of the interviewees have given orientation to new employees in the team and they can provide valuable information from the instructors’ viewpoint. The team leader on the other hand observes the situation from the supervisory point-of-view. She can provide important information about the organizational aspects of the topic.

A qualitative research in a form of a personnel survey will be conducted to support the research and gain valuable information to improvement suggestions for the commissioning organization. The questionnaire is assigned for the employees of the invoicing department. The purpose of the survey is to find out how the employees perceive the orientation process in the organization and how satisfied they are with the orientation they received when starting in the invoicing department. The primary aim of this research method is to gain honest opinions from the respondents about to process in order to identify possible defects and aspects that need to be improved.
2 ORIENTATION THEORY

2.1 Defining Orientation

Orientation is the final step in the employment process (Rao 2009, 69). As a whole, the concept of orientation contains two different aspects: workplace orientation and job guidance (also referred as task orientation). In short, the concept means familiarizing a new employee with the company and his/her work. The separation between the two phases of orientation is following. Workplace orientation consists of the general introduction of the company, its policies and departments, safety issues etc. In literature, the word orientation is commonly used when talking about this introductory part in the very beginning of the employment. In this thesis, it is referred as workplace orientation for clarifying the difference between the two discussed phases of orientation. In workplace orientation, the basis for working in the company is provided before going into detail with the actual work tasks that the employee will be responsible for. The second aspect of orientation is the job guidance, where the new employee gets on-the-job training for his/her tasks and duties. The objective of job guidance is that the employee gains enough knowledge and skills in order to work independently and proficiently. (Santalahti, Mäkeläinen & Hämäläinen 2010, 1.)

Orientation process needs to cover, not only the work done in the company’s own facilities, but also work that is performed outdoors or at the customers’ premises. Organized orientation process is necessary regardless the size or field of the organization and it should be provided for all employees irrespective from their position in the organization; the line writers, supervisors, temps, part-time employees and so on. Since workplace orientation is about introducing the facilities and procedures, it concerns only the new employees. The job guidance on the other hand is essential to provide also for existing employees who have been working in the company for a longer time. For instance, when a company implements a new IT-system or purchases new machinery that employees need to learn how to operate, the job guidance is required for all employees. Based on this fact, orientation is a continuous process that should be developed according to the needs of the personnel and the changing environment. (Penttinen & Mäntynen 2009, 2.)

Usually orientation is conducted by the immediate supervisor of the new employee. His/her responsibility is to plan, implement and monitor the orientation. Some parts of orientation are often delegated to one of the existing employees of the department in question but the responsibility remains with the supervisor and line manager. The assigned employee should be trained for giving orientation and guidance. (Penttinen et al. 2009, 2.) Especially when it comes to job guidance, in many organizations delegating the work is used because the supervisor does not usually have the best expertise on the daily activities and tasks and is not therefore the most suitable person to give instructions about them.
2.1.1 Workplace Orientation

Workplace orientation is the process of welcoming a new employee and providing the information he/she needs for starting to work in the company and to settle down promptly. (Rao 2009, 69.) In the procedure, new employees are provided with information about the organization, its operations and directives. The basic information involves company rules and policies, and issues such as working hours and holidays. After the basics, more detailed information about the work practises is explained. This involves exact information of the daily operations, company structure, safety and security information, and introduction of the workplace and co-workers. (Dessler 2002, 184.) Commonly the workplace orientation takes place during the new employee’s first day on the job. It is vital that the immediate supervisor of the employee is available for welcoming the new employee to the organization and to provide the first introduction to the job and the workplace. (Valvisto, 2005, 46).

Workplace orientation process can be divided into two main categories: organizational orientation and departmental orientation. Purpose of the organizational orientation is to familiarize the new employee to the whole organization, its products, history and policies. The objectives, mission, competitive advantage and standard procedures should be explained to the new hire. In addition, it is important to explain how the employees fit into the strategies and objectives, how the employees help to achieve the company’s goals and why they are vital for the company’s success. Also training opportunities and other career development possibilities are advisable to be introduced at this stage. Normally organizational orientation is held to a larger amount of new employees because it contains a lot of information and therefore it takes time to present. It also requires one or more experts of the covered topics to give the presentations. The orientation session should be well-structured and planned in order to achieve the best results. (Arthur 2006, 298.)

The departmental orientation is less formal than the organizational orientation. This part of orientation consists of familiarization to the facilities, the co-workers and workstations. It should include a walking tour around the premises so that the new employee can actually see where everything is located and in which workstation his/her team members and other teams work. Once the basic information is given, the department-specific information should be explained. This includes for instance the following matters: departmental responsibilities, structure of the department, job description (tasks and responsibilities), confidentiality issues, working hours, break policies, performance expectations, internet usage policies, information channels, dealing with personal matters (e.g. personal phone calls), occupational health care system, salary and vacations. (Arthur 2006, 302-304, Rao 2009, 70.)
2.1.2 Job guidance

There are several situations where job guidance is required. Naturally, when a new employee starts and is not familiar with the work, he/she needs a thorough training and introduction to the job. Other situations where job guidance should be given are following: the job responsibilities or methods change, new machinery or equipment are implemented, a specific task is done rarely and is not familiar for all, the safety instructions are neglected or an accident happens, the work situation differs from the conventional, defects or lacks in the processes or product quality are recognized and in case the originally given guidance has been insufficient. (Penttinen et al. 2009, 4.)

A thorough job guidance given for new employees consists of all the issues that relate to performing the job. These include for example the job description, division of the tasks that the work consists of, knowledge and skills required for performing the job and utilization of the necessary equipment and machinery. Part of the job guidance is also going through the work safety matters and explaining all possible health or safety risks, what precautions have to be followed to avoid or minimize the risks (e.g. wearing a helmet) and how to work securely. Important part of job guidance is that the instructed person gets to participate actively in the process. It makes learning considerably more effective and as said in many contexts, “learning by doing” is the best approach for assimilating new things. (Penttinen et al. 2009, 2.)

![5 step model of job guidance](Vartianen et. al. 1989, 93)
A five-step model is one of the well-known and commonly used methods developed to support the job guidance process. The model was originally presented by Vartiainen in 1987 and since then, it has been utilized in several companies as a tool for job guidance. The model introduces five steps (Figure 2) that can be used as a basis structure for the on-the-job training.

1. The first step is the start point of guidance, where the existing skill and knowledge level is evaluated. Based on the existing know-how, the instructor can evaluate from how basics to start the instructions. In this step, the new employee is encouraged to learn and the goals are set. The person giving the guidance describes the tasks to be learnt.

2. The second step, giving instructions, consists of explaining, rationalizing and demonstrating the tasks for the new employee. The instructor shows how the work task is done while explaining the activity and supporting the information with arguments why the task is done in a certain way and why it is important. Providing the rules and regulations related to the task should be done at this stage.

3. The third step, vision exercise, is a method used for more effective and efficient learning. At this stage, the new employee describes the tasks that he/she has been thought. The instructor asks to explain the process with own words and repeat the information in one’s mind and follows and supports the processing of information.

4. The fourth step, practical training, is the stage when the new employee gets to practise the job under supervision. The employee is allowed to try and practise the tasks and should be given feedback on how he/she is doing. After feedback, the practice is repeated and finally the skills level is evaluated.

5. Once the final step, confirming acquired information, is reached, the employee is ready to work independently. He/she is provided with feedback and encouraged to ask questions whenever something is unclear. At this stage, the official job guidance is finished but the employee of course gets assistance and support whenever he/she needs it. (Vartiainen, Teikari & Pulkki, 1989, 93-100.)

2.2 Preparing for orientation

Careful planning and preparation is the key for effective implementation of any business process and the same applies to orientation. By following certain guidelines, orientation program can be made more effective. The foundation needs to be ready to enable the success of the program. The basic preparatory steps that need to be taken care of before the orientation are: assigning a person in charge for the orientation of a new hire, making a detailed plan, assembling related material that supports the orientation and is given for the new employee, training the person responsible for the orientation and other employees who participate in the orientation process. All of these preparations should be supported by an open discussion within the organization and a constant development of the plans. (Penttinen et al. 2009, 3, Rao 2009, 72.)
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Besides the orientation material, also other necessary documents should be prepared in advance and the workstation of the new hire should be made ready and prepared with requisite supplies. A part of the planning is to make a schedule and agenda for the new employees first day (or longer period when required) in order to ensure that all necessary issues will be covered. (Arthur 2006, 294-296.) A structured orientation program that is divided into separate phases could be an effective approach and ease the employee in understanding and learning the information. Having another employee as a partner (explained in more detail in chapter 2.3.1) could make the integration to the work environment easier and reduce anxiety. (Rao 2009, 72.)

In addition, access materials (keys or access passes) and all reading material that will be given during the first day on the job should be prepared. Also some informing matters should be taken care of before a new employee starts in the company. It is advised that a brief welcoming letter should be send to the employee before the first day on the job. Additionally, other members of the department should be informed about a new member joining the team and give some background information about the new employee so that it does not come as a surprise for anyone. (Arthur 2006, 294-296.)

2.3 Work instructions

A work instruction is a guidance that enables the employee to perform the work correctly. Its main objective is thereby achieving quality. In many organizations today, the work instructions are not designed so that the employees could easily read and understand them. To ensure the clarity and effectiveness of the work instructions, they should fulfil and reflect four important characteristics: credibility, usability, accessibility and consistency. For maintaining the credibility of the work instructions, they need to be updated whenever changes occur. In case the instructions are not updated and well maintained, the employees may lose trust on them and consequently the instructions lose the credibility. When the changes in operations and work methods are passed on verbally without updating the information to the work instructions, a lot of information can be missed and the information may not reach all of the employees involved. Clarity is one of the most essential characteristics of an effective work instruction. The clearer the instructions, the quicker it is to read and understand them. Graphs and figures increase the clarity and they should be applied whenever possible. The information should be kept simple and related to the explained topic, without additional, unnecessary text to read. The work instructions should also be easily and quickly accessible. In addition, the instructions need to be consistent so that they can be easily followed. Examples of the required consistency are: a term used in the instructions has to mean the same every time and, the format and layout should be coherent. (Four Essentials of Effective Work Instructions, 2012.)
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2.4  Orientation tools

2.4.1  The Partner Program

The partner program (also known as shadowing or sponsor system) means that a support person is selected for the new employee to give assistance and guidance in the beginning of the job relationship. The selected person should be from the same team and thereby he/she is able to answer the task related and general questions that arise in the mind of the new hire. The assigned partner is there to provide encouragement and to help in the integration to the team and familiarization to the work. Overall, the idea is that the support person makes the transition to the new work environment easier and ensures that the new employee feels welcome and becomes a part of the team. From the new employees’ point of view, this approach is beneficial because he/she knows that there is always someone to turn to when assistance is required. (Arthur 2006, 310.)

The manager or supervisor usually gives a formal introduction to the company policies and to the work tasks. As the assigned partner is part of the team and from equal position as the new employee, he/she can provide some additional, less formal information and tell about the unwritten rules of the organization. From the partner this program takes time and commitment but in the long run, it is rewarding for all parties. One of the benefits for the partner is the possibility to self-development through the process, for instance in the areas of leadership and communication skills. The formality of this program depends on the organization, in some companies, it can be very casual process and in others, there can be a structured agenda that will be followed through the process. The length of this program generally varies from a week to the end of trial period (up to three or four months). (Arthur 2006, 310.)

The role of the partner is fairly demanding and he/she should possess certain skills and qualities for the program to be successful. First of all, he/she should be motivated for the duty, have positive attitude and possess enough knowledge about the department and its goals and tasks. The wide knowledge comes from experience and therefore the selected partner should be someone who has been working in the company for a long enough time to be able to share all necessary information. Ideally, the partner should also be flexible, patient and have good verbal skills in order to explain the issues clearly. During the partnering process, the manager should check that everything is going well and in case problems with the partner/new employee relationship occur, he/she should take actions accordingly. In ideal situation, companies should provide training for the employees interested in the role of a partner. (Arthur 2006, 311,312.)
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2.4.2 Orientation follow-up

To ensure that the orientation has been successful and the predetermined objectives have been reached, a follow-up procedure should be a part of the orientation programs in the organizations. The new employees may not have courage to admit in case they do not recall all issues that were covered in the initial orientation. Therefore, a scheduled follow-up meeting should be organized to provide feedback about the orientation, based on which the strengths and possible weaknesses of the orientation program can be identified for future development. Important aim of the follow-up is that the issues that have remained unclear in orientation can be further discussed. An alternative approach to arranging a meeting is to use a checklist where the employee can evaluate the received orientation. (William & Keith 1996, 259.)

2.5 Objectives and Benefits of Orientation Programs

The primary goal of orientation programs should be assuring the employee about the decision to join the company and make them feel as a valued employee. When this objective is achieved, it can affect the employee retention positively. (Arthur 2006, 289, Rao, 2009, 71-72.) From the company’s perspective, another important objective of orientation is ensuring that the new employee understands the policies and regulations and will work accordingly. By effective orientation, errors are reduced and level of performance increased. (Dessler 2002, 184, Penttinen et al. 2009, 4.) In case the communication policies and employment legislation issues are not clearly defined in the orientation process, it can even lead to costly proceedings or unnecessary disciplinary actions (Arthur 2006, 289). Effective orientation is vital from people management perspective. It aims to make the new employee feel welcome at the workplace and belonging to the team. (Dessler 2002, 184) According to Arthur (2006, 289) a survey has shown that nearly every second employee feels that they did not receive the support they needed when starting in a company. In order to an employee to concentrate fully on the work tasks, they should first feel comfortable with the facilities and procedures, and gain understanding about the company expectations.

When an orientation program is planned and implemented well, it provides several benefits for the employers. First and foremost, it is the foundation for effective relations between the employer and employee. It should be seen as an opportunity to indicate a commitment to the well-being and development of employees. (Arthur 2006, 291.) Orientation has a vital role in development of human resources and it can be seen as an investment. Through effective orientation programs the service quality, level of expertise and employee commitment and wellness are improved. Correspondingly, safety risks, sick leaves and employee turnover are reduced. (Penttinen et al. 2009, 1-3) Arthur (2006, 291) suggests that in order to gain best response from the new hire and maximise his/her contribution, employer should start the orientation by explaining certain matters.
The matters are following: how well the employees are listened in the company, what has been done to make the employees feel appreciated and somehow demonstrate how great it is to work for the company. This is an alternative approach to the traditional way of explaining about the organizational structure and the rules of the company. However, these matters need to be explained and the employee needs to know exactly what is expected from him/her. The manner of introducing the more formal issues has an effect to the creation of mutual respect. Orientation programs can also make the new employees learning process faster and more efficient. Orientation provides departmental information and knowledge about the equipment etc. and when an employee knows these issues, the amount of time asking for assistance or trying to sort these things out individually, is reduced. (Penttinen et al. 2009, 3, Arthur, 2006, 291.)

Employees see the importance of orientation very differently from the employers. From the employees’ perspective, usually the most important factor when starting in a new company is to feel welcome. Making the new hire feel welcome, can be accomplished fairly easily by good preparations and making a schedule and a plan for the first day. A new employee wants to know about the issues that affect him/her personally. These include the basic information for daily activities such as clothing, parking, supplies and equipment; lunch hours and other breaks, personal hygiene etc. On the departmental level, other benefits that employees seek in orientation are getting to know the people with whom they will be working, knowing whom to approach in case of questions or concerns, and learning about the evaluation process, departmental goals and the communication channels. Organizationally speaking, important facts to know are the affecting procedures and policies, company’s expectations and reward mechanism. Only after the employee feels that the issues listed above are introduced, he/she feels confident enough to start concentrating on less personal, organization wide matters such as company’s goal and competitive position. (Arthur 2006, 295.)

2.6 Problematic issues with orientation programs

Orientation process is not always successful and as in every business function, there is a risk of something going wrong. Therefore, good preparations are vital in order to minimize the potential risks. One of the potential problems is that the person giving the orientation (usually the immediate supervisor) has a lack of time resources, or is not trained well enough to carry out the program. Another problem may be that the new employee is provided with too much information at once and he/she is not able to take in all the information. (Rao 2009, 72.) If the employee gets pressure of not learning everything fast enough, this may cause nervousness for the employee instead of gaining confidence, as is one of the objectives of orientation. Through identifying the possible problems with the orientation process, they can be avoided or the risk can be minimized with some precautions. As an example, by making sure that the person giving the orientation is well trained and prepared to reach the wanted results.
3 ORIENTATION IN SHARED SERVICE CENTRE

3.1 Data collection

In Shared Service Centre, a common database is maintained for the use of all employees. In the database, the general and team-specific instructions, orientation guide, meeting memos, material from the personnel info sessions, customer information and other important data is maintained and can be accessed by all of the employees. The description of the current situation is written partly by utilizing these documents and files from the company’s Intranet. Other source of information is the personal experience of the author gained through working in the organization for over a year. While working in the company, the author has observed the orientation process and other procedures of invoicing department. She has participated in weekly team meetings of the researched team and some of the issues analysed in the following chapters have arisen in these meetings. The author’s ideas and conclusions are reflected when analysing the orientation process in the researched department. Another data collection method was to conduct a survey to the whole invoicing department. The objective of the survey was to find out more information about the orientation in SSC in general and research how the employees perceive the current procedures and how satisfied they are with the orientation. The questions and results of the interview will be reported and analysed in this chapter.

The primary data collection method was conducting interviews with two current and two former members of the team in question because they have the best insight and up-to-date information about the research question. In order to understand the current situation and find out where improvements could be made, the supervisor of the researched team and the four employees were interviewed. The sampling of the interview was thereby five people and due to the low amount and turnover of employees in the researched team, for this qualitative research it is adequate amount to provide reliable and sufficient results. All of the interviewed people have different amount of experience in the team and they have had varied responsibilities, which provides variability and profound for the results.

The interviewed people looked at the subject from different point of views because of their different backgrounds, which enabled gaining more information to support the research. One of the employees has started in the team only a few months ago and could look at the subject more from the point of view of a person who is given the introduction. Both of the former employees, who have recently moved to another team, have been responsible for giving orientation for new employees in the researched team. Therefore, they could evaluate the orientation process from the instructors’ perspective. When the team leader was interviewed, she was asked about the general orientation procedures in the organization. Her point of view was naturally different from the employees’ point of view as her comments were mirrored from the whole organization’s guidelines and the other employees answered more as individuals and through their own experiences. The interviews are referenced when analysing the current situation of the department.
3.2 Organizational Orientation in SSC

The organizational orientation of Shared Service Centre is organized in a form of an info session for summer workers in the beginning of June every year. The date is selected so that most of the seasonal workers have joined the company. The occasion is a joint info session for the summer workers of Shared Service Centre and an outsourced accounting services company called Vähittäiskaupan Tilipalvelu VTP Oy. (Figure 3 shows the position of these two companies in the finance sector of Kesko Corporation.) The briefing consists of introducing Kesko Corporation, SSC and VTP Oy and the main presentation is given by the Regional Manager. Other presentations are given by a representative of SSC and VTP Oy. The session contains a lot of important information in a compact package and it takes approximately three hours. (Team leader, interview 3.10.2012, Kesätt Info 12.6.2012.)

![Diagram of Kesko Corporation's organizational structure]

The briefing is mandatory for all of the new summer workers because it provides a lot of important information that all employees should be familiar with. Also summer workers who have already worked in the organization in previous summers are recommended to join the info session to revise the issues that may have been forgotten during the time off from work. Besides summer workers, other employees who have recently joined the company should attend the info session.
Developing orientation in the invoicing department and producing a work instruction manual

The first part of the organizational orientation concentrates on Kesko Corporation and the retail sector in general. First, a short introduction to the retail sector in Finland is given and then the position of Kesko in the market is introduced. The presentation consists of general introduction of the company, its mission and strategy, organizational structure, some important financial figures, competition and customers, current trends in the customers purchase behaviour, regional information (operations in Pirkanmaa), the future plans and projects of the organization and the changing environment and its effect on the operations. (Info Kesätyöntekijöille 2012, 2-20, Kesätyöntekijät 1362011, 2-36.) The presentation about Shared Service Centre introduces the history, main operations, mission, core competencies, customers, financial facts and figures, different departments and their key activities, organizational structure and controlling measures of the company. All of the things covered in the presentation are issues that can be found in the general guidelines of organizational orientation explained in chapter 2.1.1 Workplace orientation. On top of the company-related information, also employees role, what the job offers to the employees and a training possibility is introduced. As was suggested by Arthur (2006, 298), this part of orientation is advisable to give to a larger group due to its informative, general nature and the time commitment required from the higher level of management. The same applies to the procedure in SSC as this part of orientation is common for all summer workers and other new employees.

3.3 Departmental Orientation in SSC

The first day of a new employee in Shared Service Centre starts with his/her immediate supervisor. According to the current procedures, the team leader first meets with the new employee, generally in the team leaders’ office, and goes through the orientation guide point by point. (Team leader, interview 3.10.2012.) It is the team leaders’ responsibility to go through the key points from the manual with the employee. After going through the orientation guide with the employee, he/she can keep the paper version and read it through with more detail individually. Electronic form of the manual is available in the common database. After the team leader has given the introduction and tour around the facilities, the new employee is introduced to his/her team. One of the fellow team members, assigned by the team leader, then gives a more thorough job-related introduction and training for the position. (Perehdytyskansio 2012, 4).

In most of the departments, the person who trains new employees varies depending on the workload and no employee is specified on training especially. In some cases, the team leader may delegate the whole orientation process to the person who gives the on-the-job training to the starting employee. The interviewed team leader states that the common policy in the organization is that the person with the best expertise on the tasks is assigned to be responsible for orientating the new member of a team. This can apply to many employees of a team with enough job experience, not only one person.
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She pointed out that in the flow-through invoicing of Kesko Food, currently all four permanent members of the team are familiar with the processes so well that they can be assigned to give orientation. However, until May 2012, her former substitute who had recently moved to another team supported the team by giving orientation due to her experience on the function. Normally tasks across team borders are not implemented, but this was a case of recently changed team assembly that took place in the spring. (Team leader, interview 3.10.2012.)

3.3.1 Orientation guide

Shared Service Centre has a common orientation guide that provides the basic information about the organization and its policies. The orientation material includes the following two chapters. First chapter “Welcome to Shared Service Centre” introduces the aim of the orientation material, key points about the organization, working hours, collective agreement, salaries, employment benefits, support for free-time activities, employment health care and occupational safety delegate. The second chapter called “Practical information” describes all practical matters that are necessary to know in order to manage with the work from the very beginning. The issues include general information about the workstations, answering to the phones, mail delivery and office supplies. Other issues explained are the social facilities, smoking and parking policies etc. Also the open office conduct and non-disclosure obligation are explained. (Perehdytyskansio 2012, 4-10.)

As summarized above, the orientation guide includes the basic information that helps the new employee to start in the company. The guide consists of brief introduction of each topic and in many cases there is a link where more information can be found either on internet or the Y-drive of the company’s common database. (Perehdytyskansio 2012.) The reason behind this approach is understandable, because not everything can be written in the guide or otherwise it would become a too heavy package to read. However, one of the interviewed employees, who have started to work in SSC only eight months ago, mentioned that for her it was very confusing to read the orientation guide because it contained so many references to the Y-drive. At the time she was reading the guide, no one had told what the Y-drive is, how to access it and how to find certain information from there. (Interview: Employee 4, 2.11.2012.)

When the selected employees were interviewed, the orientation guide was covered. Two of the interviewees had not even seen this orientation guide even though they have given orientation to new employees and summer workers in SSC. Both of them had started in the invoicing of Kesko before the orientation guide was made in its current form but, as employees who give orientation, it would be essential that they are familiar with it. As covered in the interview with the team leader, the supervisor of each team goes through the guide with the new employee and prints out a copy of the guide for the employee. (Employees 2 & 3, interview 26.10.2012, Team leader, interview 3.10.2012.)
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Even so, all employees who give orientation in SSC should be familiar with this common orientation guide because the new employee may ask questions for which an answer could be found in the guide or he/she may need some clarification for some of the covered topics.

3.4 Job guidance in SSC

The instruction for the actual work tasks is given by a selected member of the new employee’s team. The person giving the job guidance is assigned in advance and should be prepared to give the orientation. The time resources are arranged so that the team can cope with all work even though familiarizing a new employee takes some time from the joint resources. The general guideline in the flow-through invoicing of Kesko Food is that the assigned person is the one with the best expertise on the specific tasks. There is no specific time limit set for the length of the job guidance. The principle is that the new employee is provided with instructions and support as long as he/she requires. (Team leader, interview 3.10.2012.)

The supervisor of the new employee gives the workplace orientation, but does not give the job guidance. This is simply because the other team members work with the processes daily and know exactly how the concrete activities such as inputting invoice material is done correctly and efficiently. Even though the supervisor is familiar with the processes, her daily activities are naturally very different from the other employees of the team. This is the main reason for selecting someone who does the same tasks as the new employee will perform, to give the guidance.

3.4.1 Work instruction manuals

The orientation guide is used for all of the departments and teams, and it contains only general information that can be applied in all of the positions within the company. In addition, all teams should have their own orientation or training manuals that contain more detailed information about specific tasks. The width and quality of these manuals varies considerably. The company’s policy is that all guides and instructions are maintained in the shared database in electronic form. When any improvements or changes are made, these should be updated to the electronic files. In SSC, there was a decision made to update the instruction manuals for all of the invoicing teams during the years 2010 and 2011. The team leaders of the invoicing department made an instruction document, dated 1.2.2010, for writing the manuals. The key points of the document were the following:
1. In the manuals, all of the tasks of each process are described.
2. In case there is a need to write more instructions later on, these should be updated to the manual instead of writing separate documents or notes.
3. The existing instruction documents will be maintained in Y-drive.

The instruction document for writing the manuals also includes the layout requirements and other technical information in order to the manuals to be parallel. (Työohjeiden kirjoittamishje 2010.)
In the flow-through invoicing department of Kesko Food, to which this research is concentrating, there is currently no coherent instruction manual available despite the planned action described above. There are some separate documents and not all of them are in an electronic form at all or they are not easy to find from the database since they are located in different files. The flow-through invoicing team used to be joined with electronic invoicing (EDI) team of Kesko Food. A coherent instruction manual is made for the electronic invoice processes, but the flow-through invoicing process instructions are missing. The work tasks of the two processes are completely different and the instructions do not apply for both. There should be two separate instruction manuals for these operations. The two teams were separated in the beginning of 2012 along with a structural change in the organization. The objective of the change was to optimize the business functions in the organization and align teams according to similar operations instead of based on the customer organization as in the previous team division. As a result, the departments were restructured and many team assemblies modified.
3.5 Personnel Survey: Orientation in Shared Service Centre

As a part of the research, a personnel survey was conducted in the invoicing department of Shared Service Centre. One aim of the survey was to find out how satisfied the current employees are with the orientation they received when they started in the invoicing department. The primary goal was to get development ideas and suggestions for the orientation process in SSC and find out what the employees think the weaknesses in the current orientation are. After summarizing the research results, they will be critically evaluated. Based on the results development suggestions for the orientation of commissioning organization will be made. The answering for the confidential questionnaire was anonymous in order to get the honest opinions from the respondents. Answering was done by filling a printed paper form and returning it to a sealed return box.

3.5.1 Sampling, response rate and division of respondents

The questionnaire was assigned for the employees of the invoicing department in Shared Service Centre and the sampling was 70 employees. The number of received responses was 59 and the calculated response rate is thereby 84%, which is a good result and provides reliable research results. The survey was made for the employees of all the invoicing teams in Shared Service Centre, which means nine teams in total. All of the invoicing teams were represented in the results. The following figure 4 presents the teams that were part of the survey and shows the division of all of the responses in relation to the teams.

![The percentage share of the invoicing teams in relation to all responses](image)

Figure 4  Invoicing teams and their percentage share of all responses
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The amount of employees working in the teams varies from four to twenty and therefore the comparison between the teams is not in a central role with the survey. It was nevertheless important to identify which team each respondent represents in order to find out team-specific improvement ideas and suggestions. Also the respondents’ work experience in the invoicing department was asked in order to identify the most recent experiences about the orientation. Even though the satisfaction and development ideas of all employees are important, the new employees have the most up-to-date information about the current level of orientation. Figure 5 shows the division of respondents according to their working years in the invoicing department of Kesko.

![Figure 5](image)

**Respondents’ work experience in the invoicing department**

- Less than a year: 31%  
- 1 to 2 years: 25%  
- 3 to 5 years: 29%  
- More than 5 years: 15%

The above figure shows that one third (31%) of the respondents have been working in the department less than a year. The high share of new employees reflects the fairly high turnover of employees in the department that the author has observed while working in the company. The recently started employees can provide constructive feedback on the orientation because they have recent experiences and fresh memories of the process. The employees who have worked in the department for a longer time may not have clear memories about the orientation they received and the processes have changed so that the information may not apply anymore. However, they can evaluate the lacking aspects of orientation in the perspective of a person giving the orientation in case they have experience in working as an instructor. Even if the respondent is satisfied with the orientation he/she has got when starting in the department or does not remember details about it, he/she can provide suggestions and opinions based on conversations with the team members.
The respondents were also asked whether they have personally given orientation in Shared Service Centre. The aim of this question was to identify the percentage share of employees who have given orientation for new employees. Based on the responses, the share turned out to be more than half of the respondents, in total 56%. Besides finding out the amount of people who have given orientation, the question was asked in order to identify background information to the improvement suggestions and open comments.

![Work experience of the employees who have given orientation](image)

**Figure 6** Division of the employees who have given orientation in SSC in relation to their work experience

Figure 6 shows the division of the employees who have given orientation in Shared Service Centre, distributed based on their work experience. This comparison was made mainly to identify how high percentage of the instructors has worked less than a year in the company. The answers in the survey had some references to the fact that some of the instructors are not experienced enough to give orientation for new employees. The author has observed the same issue while working in the invoicing department and the interviews referred to the problem as well. According to the results, out of the people who have given orientation, only three (9%) have less than a year of experience in the company. The main responsibility of the orientation seems to be still with the employees who have more work experience. 67% of the respondents who have given orientation have three or more years of experience in the company.
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3.5.2 Respondents’ satisfaction with the orientation in SSC

**Figure 7** Average satisfaction level of all respondents on a scale from 1 to 4 about the received orientation for invoicing in Kesko

<table>
<thead>
<tr>
<th>Satisfaction Level</th>
<th>Average Score of All Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.00 (not at all satisfied)</td>
<td>2.58</td>
</tr>
<tr>
<td>2.00</td>
<td></td>
</tr>
<tr>
<td>3.00</td>
<td></td>
</tr>
<tr>
<td>4.00 (extremely satisfied)</td>
<td></td>
</tr>
</tbody>
</table>

**Figure 8** How satisfied employees from different invoicing teams are with the orientation, contrasted with the average score of all responses, n=59

The respondents were asked to evaluate how satisfied they are with the orientation they received, when they started in the invoicing department of Kesko. The evaluation scale was from 1 to 4, where 1 = not at all satisfied and 4 = extremely satisfied. The average score of all responses was 2.58 which is slightly on the more positive side of the scale. Figure 8 shows the average score of each team. All of the scores are close to the average and there is no distinct variation between the teams. According to the result, all teams are fairly satisfied with the given orientation but on the other hand, no team is extremely satisfied. This reflects the fact that there are some needs for improvement in the whole invoicing department.
Developing orientation in the invoicing department and producing a work instruction manual

When analyzing the survey results, a contrast between the work experience and the satisfaction with orientation was made to identify differences between the opinions of new employees and the employees who have longer work experience. The results showed (Figure 9) that people who have worked in the department less than a year had the best average score (2.83). Employees with work experience from 1 to 2 years were the least satisfied with the given orientation with the score 2.22. At least one reason behind the dissatisfaction in this category was found in comments from the open-end question 6 of the survey. Few representatives of this group had mentioned that at the time they joined the company (a little over a year ago), there was a lot of delay in the processes and employees were extremely busy. In the respondents’ opinion, this affected the width and quality of orientation negatively. Even though the employees with least work experience are the most satisfied with the orientation according to the results, they provided most improvement suggestions and ideas in the answers. It can be argued that it is because they have the most recent experiences and ideas about the subject. Overall, the variation between these scores is not so clear that straight conclusions could be drawn from the results about the relationship between the work experience and satisfaction with orientation.

![Average scores in relation to the work experience](image)

Figure 9  How satisfied employees with different amount of work experience are with the received orientation, contrasted with average score of all responses, n=59.
3.5.3 Development areas in the orientation in SSC

<table>
<thead>
<tr>
<th>Development areas in the orientation process</th>
<th>Percentage of all respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction of other teams</td>
<td>32 %</td>
</tr>
<tr>
<td>Supplies and work stations</td>
<td>32 %</td>
</tr>
<tr>
<td>Suitability of the instructor</td>
<td>25 %</td>
</tr>
<tr>
<td>IT-guidance</td>
<td>32 %</td>
</tr>
<tr>
<td>Clarity, width of Work instructions</td>
<td>46 %</td>
</tr>
<tr>
<td>The content of Orientation guide</td>
<td>29 %</td>
</tr>
<tr>
<td>Duration of orientation</td>
<td>44 %</td>
</tr>
</tbody>
</table>

Figure 10 How many percentages of the respondents consider each of the named area to be lacking

Question 4 in the survey contained seven predetermined issues that could be potential development areas in the orientation process. The areas were as follows: duration of orientation, the content of orientation guide, clarity and width of work instruction manuals, IT-guidance, suitability of the person giving the orientation, supplies and workstations (e.g. ergonomics) and introduction of other teams and departments. The respondents were asked to mark the issues that, in their opinion, are lacking and could be improved. There was also a possibility to name other areas of development outside of the list. All of the listed issues were marked several times and fairly even need for improvement for all issues was reflected in the results. In figure 10, the percentage share of the respondents is shown for each of the named area. Nearly half of the respondents thought that the work instructions could be improved (46%), and the duration of orientation is not sufficient (44%). The problem about the insufficient length of orientation came up several times in the open-end question in the survey as well. Many of the respondents felt that the orientation should be more detailed and last longer. Some respondents had the feeling that due to the hectic schedule and delay at the workplace, the instructor did not have enough time to give comprehensive guidance. The new employee was directed to work individually before he/she felt confident about the work tasks.

On top of the named development areas, few other suggestions and comments were made in relation to factors that could be improved. One of the comments was that the accounts for the IT-systems, such as SAP or e-mail, needs to be ready before the new employee starts. Now there have been some problems with this and the new employee has had to use other employees’ accounts for quite a long time. The same issue came up also in the open-end question. Another comment was that the workstations of the team members should be located nearby so that asking for advice from team members would be easier.
3.5.4 Improvement suggestions given by the respondents

The last question in the survey was an open-end question in which the respondents could give general comments relating to the orientation or provide improvement suggestions. Overall, 26 open comments about the orientation were given, which means that 44% of the respondents answered this voluntary question. These open comments provide valuable information for identifying the lacks in the orientation process and provide the honest opinion of the employees. All of the comments will be provided to the commissioning organization in their original formula when reporting the final results of the personnel survey. Based on the received comments, here are summarized the key points that have been lacking and should be taken into account in the orientation:

- Clear, common guidelines for the people giving the orientation.
- Going through the orientation process and agenda with the people giving orientations to ensure consistency in orientating new employees.
- A clear list about the topics to be covered in the orientation.
- Adequate time reserved for the orientation.
- Ensuring that the person giving the orientation is experienced enough.
- Starting the orientation from the very basic issues, such as special vocabulary.
- Providing more information about the complicated cases and exceptions, not only about the basic invoicing process.
- Emphasizing ergonomics in orientation.
- Providing a wider overview about the whole invoicing process and the impact of the employees work in different issues (reasoning the operations – why, not only how, things are done).
- Introducing other teams in more detail.
- Involving all team members in the orientation, otherwise a lot of important information is not shared.
- Arranging own workstation for the new employee (currently a new person may have to change workstation even daily and look for an available place every morning).
- Underlining team leaders’ responsibility to make sure the orientation is sufficient and of good quality.

3.5.5 Contrasting the results of the personnel survey with previous results

At the end of summer season in 2012, the summer workers were asked to give feedback about their work in Shared Service Centre and one of the covered topics was orientation to the job. Similar development areas came up in the comments of the interviewed employees as came up in the survey conducted by the author. Based on the feedback given by the summer workers, the summarized issues that could be improved in orientation of invoicing department are following:

- There should be more time to get familiar with the work instructions.
- During summer peak, there are too few permanent employees to ask for help from.
- The procedures and the given instructions vary depending on the person who gives the guidance – lack of consistency.
- A clearer picture about the operations of SSC and the whole financial process should be provided.
- Explaining the terms and used abbreviations.
- Introducing the functions of other departments such as Accounts Payable and Accounts Receivable.
- Providing a follow-up orientation (e.g. after two weeks) to ensure that everything is going well and to revise the unclear functions.
- Reasoning the operations, for example when explaining about transactions in SAP, telling why something is done in certain way, not only how.
- The expectations for summer workers skill level, for instance in relation to knowledge about SAP, is too high.

Both in the personnel survey as well as in the interviews conducted after summer season in 2012, the emerged key issues were the lack of consistency, inadequate depth in explaining and reasoning the processes and the used terms and transactions, and insufficient length of orientation. These issues will be discussed further in this thesis and improvement suggestions for the issues will be provided in chapter 4.

3.6 Analysing the current situation

3.6.1 Employees who give orientation

In the analysis of the survey results as well as the conducted interviews, there was repeated a defect in the preparation for the job guidance part of orientation. In the open-ended question of the survey was pointed out that the people who give orientation should have clear, common guidelines. This would make familiarizing the new employee easier, create consistency for the process and make the new employees’ learning process faster. Currently there are no common instructions on how to give orientation. The interviewed employees who have given orientation mentioned that they were never given any training or specific instruction on how the orientation should be conducted. They were only asked to give orientation to a new employee but no agenda or time frame was defined. They also did not have any separate documents to clarify and support the orientation. In their opinion, there should be one named person in each team who gives the orientation to new employees and this person should be provided with some training for the task. (Employees 2&3, interview 26.10.2012.)

In the organizational level it has been decided that there is not a named person for giving orientation in the teams. Instead, giving orientation is defined as one of the job responsibilities of all employees. The decision is based on the fact that one employee will not use his/her resources too much, but the responsibility is divided to all experienced team members to balance the workload. As mentioned before, the interviewed team leader stated that any team member with long enough experience can be assigned to give the orientation. (Team leader, interview 3.10.2012.) According to the current procedure, there is no extra incentive paid for the employees who are assigned to give orientation. Thereby, listing giving orientation as one of the job responsibilities of all employees is reasonable.
Developing orientation in the invoicing department and producing a work instruction manual

When the task is not an additional responsibility area for certain employees but part of the job description, it is acceptable not to pay an extra compensation. Given the fact that everyone should be able to give orientation for new employees and are expected to do so, there should definitely be some kind of training and general guidelines for the task.

The employees who give orientation are often notified about a new person joining the company and assigned to give orientation only few weeks in advance. There are no separate instructions provided for the people giving the orientation. From the authors’ viewpoint, the assumption in the organization seems to be that the assigned person knows his/her job exhaustively and will consequently give high quality orientation. Surely, the employees are experts in their own tasks and daily operations but still it would be important to provide common guidelines for the orientation. Even though a person is good in his/her work, does not directly mean that he/she is able to teach it in a clear and comprehensive manner to another person, especially if he/she is not trained for the task.

Giving orientation is a challenging task because everyone has their own learning pace and people have different methods of learning effectively. The two interviewed employees who have given orientation thought that from the point-of view of a person who gives the orientation, it is difficult to perceive the tasks from the new employees’ perspective. Due to long work experience, especially the standard activities are so familiar and self-evident. For the new employee, who does not have previous experience in the field, everything is new and the person giving orientation should try to view the issues from his/her angle. (Employees 2&3, interview 26.10.2012.) The employee, who gives orientation, should be experienced and confident enough in the work tasks in order to teach them. One of the respondents argued in the open-ended question of the survey that the person giving the orientation should have more than three months of experience on the job before giving orientation for new employees. The respondents experience may be an exception but points out the importance of careful selection of the employees who give orientation. On top of work experience, the person giving orientation should have the motivation for the task. If he/she is not willing to give orientation, the level of orientation decreases. An unmotivated instructor may want to teach everything as fast as possible and may not have the patience to concentrate on all issues with the required particularity.

One of respondents brought out the new employees’ role in orientation by stating that the new employee should courageously ask if anything is unclear. The interviewed team leader pointed out that the new employees are encouraged to ask questions whenever they need assistance or something is not clear (Team leader, interview 3.10.2012). Encouraging the new hire to ask questions is important to remember when giving orientation. Despite the encouragement, some people may be shy to ask questions or especially questions about a topic that has been covered in orientation, if they feel that they are not learning fast enough or they do not want to bother other team members. In the researched team, where the author has worked, the atmosphere was open and supporting.
Developing orientation in the invoicing department and producing a work instruction manual

In the team, it was encouraged to ask questions and emphasized that even covered issues can be repeated. The most important aspect was that the new employee learns the activities and feels confident about performing them. Also the interviewed employee, who has recently been given orientation to the team, felt that the atmosphere was open and positive and the co-workers were supportive (Employee 4, interview 2.11.2012). This aspect should be highlighted in all of the teams and it should be emphasized that everyone does not learn with same pace. The new employee needs to feel welcome and supported in the team. The author has observed that the general atmosphere in the department is supportive but in some teams, due to high turnover of employees and hectic schedule, asking of questions is not supported as much as in other teams.

3.6.2 Consistency of orientation

In the personnel survey results and the feedback given by summer workers, the inconsistency of orientation was mentioned by several respondents. The consistency of orientation covers both the given instructions as well as the agenda of orientation. Both of the aspects were addressed in the responses. One of the respondents stated that it was very confusing that everyone in the team seemed to have “their own way” of performing the tasks. From the point-of-view of the new employee it is more difficult to learn if the instructions vary depending on the person from whom the question is asked. Thereby, the work instruction manuals should be revised in each team and made sure that everyone has coherent work methods. One factor affecting the situation could be that there is not a named person responsible for giving the orientation as mentioned in the previous chapter. When several people give orientation, they have different ways of explaining the things. Even with several instructors in one team, the process can be made more consistent with going through the issues and deciding on common guidelines. In the chapter 4, the author provides recommendations that can increase the consistency of orientation in all departments.

3.6.3 Information about invoicing process and other departments

When the author had her orientation for invoicing department in SSC in May 2011, she felt like the information given about the departments in SSC and the invoicing process in general, was extremely narrow. The concentration of orientation was in giving instructions on how to manage with the daily tasks in the specific team but the overall invoicing process was not thoroughly introduced. The introduction of the departments is not included in the orientation guide either, besides the names of each team. As listed in subchapters 3.5.4 and 3.5.5, the same topic was covered in the personnel survey and the feedback given by summer workers this year. Many of the respondents hoped for more detailed information about the operations in SSC, the functions of other departments, impact of the employees’ activities on other aspects, clear explanation of the whole invoicing process, the business idea behind the shared service centre –model, roles of the representatives in the customer organizations and so on.
In the personnel survey, 32% of the respondents marked providing information about other departments as one of the issues that could be improved in orientation. In the invoicing department, the main responsibilities are related to simply handling of invoices and the work is possible to do without better understanding of the activities of other departments, such as Accounts Payable. However, in terms of self-development of employees, providing wider knowledge is extremely important and providing a possibility to learn more and widen the understanding can function as a motivating factor.

One of the respondents in the survey specified that in the beginning of orientation, the whole invoicing process from the purchase order to the creation of the sales invoice for the end customer should be explained. Another respondent addressed questions that had remained unclear in orientation. These questions included for example:

- Who is affected in case an employee makes a mistake in handling of the invoices?
- What is the dependency between the payment terms and the profit of the organization?
- What is the purpose of invoicing agreements and who benefits from them?
- Who are the most important suppliers?

In orientation, it would be important to provide answers for these addressed issues in order to the new employee to understand the reasons behind the activities and the profound idea of the operations. The author had similar questions in mind when she was given the orientation and when asked from the current employees, they could not answer many of the questions concerning the broader meaning of the operations.

There is some information available about the strategy and key competencies of SSC and a brief introduction of all departments in the common database. The information is not easily available and it is in the form of presentation slides from the info session for summer workers. The information is introduced briefly in the info session but there is no clear material package compiled about the issues introduced in the presentation. Even though the session is fairly brief, it is important that the new employees get at least an overview of the organizational matters. The employees, who join the company outside of summer time, are not provided with similar information at all. They can join the next info session but in case they start for example in September, they have worked in the company for almost a year before the next briefing is organized. The organizational orientation could be developed so that these employees get a chance to learn about the issues earlier.

According to the author’s conclusions, one reason for not explaining the abovementioned matters may be the lack of time in the orientation. 44% of the respondents of the survey felt that the duration of orientation could be improved. Schedule is hectic in all departments and the company aims for constant intensification of the services in order to keep the lead-times and delays on agreed levels.
Another reason may simply be the lack of coherent, comprehensive material from where the issues could be easily explained or alternatively provided for self-studying in case of lack of time resources. The person assigned to give job guidance may not know the answers for these issues either because they have never been thoroughly explained in detail. Thereby, providing material that has information on these matters would benefit also the employees with longer experience in the company.
4 RECOMMENDATIONS FOR IMPROVING ORIENTATION IN SSC

This chapter provides improvement suggestions for the orientation of new employees in Shared Service Centre. Most of the recommendations are formed so that they can be implemented in the whole organization. The author has formulated the recommendations based on the studied theoretical background of orientation and the conducted research in the organization.

4.1 Work instruction manual for flow-through invoicing of Kesko Food

As stated previously, when this thesis writing process started, there was no instruction manual for the flow-through invoicing department of Kesko Food available. So, the need for clear, coherent instructions was distinct. As a part of this thesis, the author produced a comprehensive work instruction manual for the commissioning team. The manual is written in Finnish as it is the working language of Shared Service Centre. The manual is directed to the use of SSC exclusively and due to privacy policies, it will not be published as an appendix. In this chapter, the purpose and implementation of the manual will be explained and the content will be introduced in general level without disclosing any substance that belongs to the commissioning organizations use solely.

The manual consists of clear instructions of each step of the invoicing processes in the commissioning team. The manual is written according to the defined layout of the work instructions in Shared Service Centre. The main concentration is on the work stages that are completed using SAP-system. Majority of the invoicing activities are done by utilizing the system and therefore the focus of the manual is on how to use SAP and instructions on specific transactions. The instructions of each stage include screenshots of the system to clarify the guidelines and make it possible to work with a new task individually by following the instruction manual and performing the steps in the system accordingly.

4.1.1 Content of the manual

The Work instruction manual for flow-through invoicing of Kesko Food is specially designed for the invoicing processing and activities of the commissioning team. The content is designed to best serve the invoice handlers in their daily operations, focusing especially to the needs of new employees. This main target is reflected so that the processes are described in great detail and also basic information such as relevant vocabulary is explained. The organizational information that is introduced in the common orientation guide is not included in the work instructions. The work instruction is directed to the use of the job guidance part of orientation and to the concrete work tasks of the team whereas the orientation guide is utilized in the workplace orientation.
Developing orientation in the invoicing department and producing a work instruction manual

The Work instruction manual is divided into nine chapters, all of which contain several subchapters for facilitating the utilization of the manual. The main chapters are:

1. Introduction of Kesko Food
2. General instructions
3. Flow-through invoicing
4. SAP system: SAPUSKA
5. Manual invoices
6. Scanned and e-invoices
7. Checking the invoices
8. Special instructions
9. Attachments

The first three chapters provide general instruction about invoicing and the customer organization. The first chapter introduces the customer organization Kesko Food so that when a new employee starts, he/she can get an overview of the customer and its needs. The second chapter, general instructions, explains the primary preparations that need to be done for being able to perform the daily activities in the organization. For example clear instruction on how to set up the personal printing and scanning function called Follow-You, is explained. The function enables the employee to print documents into his/her own queue and the printing is started by registering to the printer with the personal identification card. This function is commonly used in the whole organization to avoid overlapping printing of documents, since the printing volume is high. Another background function explained is creating signature for e-mail; how it is done and what the signature needs to include. In this chapter, also introduction and utilization of the document-filing system called OnDemand is given. Customer organization –specific files and codes are named and explanations on what documents are saved in the files and when each file is needed are part of the instruction. In chapter 3, Flow-through invoicing, the invoicing process and its special characteristics are explained in detail. The chapter covers instructions and guidelines in relation to following issues: invoice types, invoicing compensations, payment terms, customer codes, suppliers, product codes and determination of VAT.

Chapter 4 concentrates on the general instructions of the SAP system platform called SAPUSKA that is the most important tool in the activities of Kesko Food department. Because a new employee may not be familiar with SAP-system in advance, the very basic functions required for operating in the system are first introduced. This is important information even if SAP-system is familiar for the new employee, because the used platform and transactions are specially designed for the use of Shared Service Centre. Instructions on how to navigate in the system (including explanations on different icons and tips for keyboard shortcuts), how to add needed transactions to the favourites so that they appear in the main menu and how to change the language and other needed settings. Additionally, the purpose, use and special characteristics of each necessary transaction are explained separately.
In the following three chapters, the instructions for handling the invoices are explained step by step. Chapter 5 concentrates on how to input the manual invoices (paper form) and chapter 6 on the scanned and e-invoices. These chapters contain several specific screenshots where the required fields for inputting data are pointed out and explained what should be completed in each field. Also special rules for certain activities such as handling of credit invoices are explained. The instructions are given to the typical invoice material and the general guidelines that apply to majority of the invoices. The advices are given on what information needs to be input to the system and what to do if some error code appears. However, the invoices of different suppliers are not alike and some of the suppliers have some special instructions that need to be taken into account.

The supplier-specific exceptions of flow-through invoicing of Kesko Food are maintained in a common excel-sheet that is updated continuously when changes occur. The team members agreed with the author before writing the manual that this data will not be included in the work instruction manual due to its dynamic nature. The path for finding the document is given and the document will be used as an additional tool in handling the invoices when required. Chapter 7 explains how to check the input invoices and how to make corrections to any incorrect material. This is as a separate chapter because the same checking and correcting guidelines apply for all types of invoices of the team.

Chapter 8, special instructions, provides additional information to the daily activities. It introduces the operations that are not performed daily, such as the activities that are done only when the month changes, before the beginning of new accounting period. Also handling of complaints is part of this chapter. At the end of the manual, there are attached some additional documents that are beneficial for the employees. These are a product code listing, a list of relevant invoicing vocabulary compiled by the author, and orientation checklist for job guidance that the author produced as one of the recommendations as a result of this thesis (explained in chapter 4.5).

4.1.2 Implementation of the manual

There are yet no concrete results to report on how the produced work instruction manual has improved the orientation and daily operations in the department. However, the manual was accepted and well-received by the team leader and the team members. The forecast about its usability and benefit for the team is positive and it will be utilized by all members of the team. Copies of the manual will be printed for all team members so that it is easily available for them. In addition, the manual will be available and maintained in the company’s common database as all of the instructions of the organization. The manual is made based on to the current procedures and guidelines and it will be updated according to changes in the future. The manuals’ clear structure and table of content enables the effortless updating of specific information. Also other chapters can be added in case a new stage for the operations is introduced.
The manual will be especially beneficial when a new employee starts in the team. In orientation, it can be used as a guide when teaching the work tasks to the new employee. The work instruction enables the person to work individually sooner in comparison to the current situation because he/she will have detailed instructions for each stage of the process. Not later than next summer when summer workers join the company, the manual will be utilized by a person who is not familiar with the process in advance. Then its clarity and concrete advantage can be reported. Another identified benefit is that the manual will integrate the work methods of the employees because it provides common instructions for each task. Hence, it will increase the consistency of the operations in the commissioning team.

4.2 Orientation checklist

As an additional tool to facilitate the orientation, the author produced two orientation checklists: one for the workplace orientation (Appendix 2) that is useable for all departments in SSC and one for the job guidance of flow-through invoicing of Kesko Food (Appendix 3). The lists were written in Finnish for the use of the commissioning organization. The idea for such lists arose when the author studied the theory of orientation and notified that there was repeatedly a mention about an orientation checklist that could be utilized to clarify the process and make sure that all important issues are covered. A similar idea came up in the personnel survey as one of the respondents requested for a clear list of things to be covered in the orientation. Also, the inconsistency in the orientation caused by several people working as an instructor was mentioned as a lack of the process. The checklists will benefit both the person giving the orientation as well as the new employee. The purpose of the checklists is to provide clear structure for the orientation. They will work as a structure for the orientation and the main goal of the checklists is ensuring that all planned issues are covered in the orientation. Another identified benefit of the consistent checklist to be used in all teams is that it will make the orientation process more coherent and ensure that all of the new employees are given orientation according to the same guidelines.

4.2.1 Orientation checklist for workplace orientation

The orientation checklist for workplace orientation is designed for the use of team leaders as they are the ones responsible for giving the workplace orientation. The first part of the checklist covers the preparations that should be done before the employees’ first day on the job. These issues include for example ordering accounts for email, SAP and other used systems, preparing the workstation, updating employee information to HelpNet and assigning the employee who will give the job guidance. The second part of the checklist contains the topics that should be covered during the employee’s first day on the job. This part is divided into four main categories: job description, orientation guide, introduction tour and other general issues.
Developing orientation in the invoicing department and producing a work instruction manual

All of the categories contain specific topics that will be marked once they are explained. The order of the issues is not to be followed exactly but it can be adjusted based on the team leaders’ own perception on the preferred order of explaining the issues. Another important purpose of the list is that it names all topics separately so that everything important will be covered and marker when completed. As a background for creating the list, the author has utilized the information from the orientation guide, a general orientation guideline from the company’s Intranet and her own experience and knowledge gained while working in the company.

4.2.2 Orientation checklist for job guidance

The orientation checklist for job guidance is especially produced for the flow-through invoicing of Kesko Food and it will be attached with the work instruction manual. It contains a list of more specific tasks that are part of the employee’s responsibilities in the invoicing department. The list starts with basic topics to be explained such as logging into the computer and SAP system, creating a signature for email and introducing the Intranet pages of the company. The second part of the list covers exact activities such as searching for customer codes, handling of credit invoices and preparing a balance document. The list is fairly detailed to ensure that all necessary things are covered. As job guidance takes much longer time than workplace orientation, it is not the purpose to cover all of the issues during the first day or even the first week. The list contains also activities that are done only once a month. The main idea is that the list can be utilized to keep track on the topics that are already explained and what will be explained later on. As in the workplace orientation checklist, it is not necessary to follow the list step by step. However, the first part that lists the general instructions is advisable to explain first. When it comes to the activities related to handling of invoices, the person who gives the orientation can identify the best order to cover the things, based on his/her preference and the time and other resources of the team. The author suggests that all of the invoicing teams, and other teams as well, would make an orientation checklist for job guidance according to the specific tasks of their team. It would increase the clarity and consistency of orientation in all teams.

4.2.3 Implementation

The orientation checklists should be introduced to the new employee in the beginning of the corresponding stage of orientation so that he/she would get an overview of the things to be covered during the first days and weeks of employment. Having information about what to expect is likely to increase the confidence of the new person. The idea of the checklists is that once each of the named area is covered in orientation and the new employee has assimilated the topic, it will be marked to be completed. In the checklists, next to each named area to be covered, there is a field for inputting the date when each of the steps is covered in orientation. At the end of the checklists, there is a field for signatures of both the person giving the orientation and the new employee.
Developing orientation in the invoicing department and producing a work instruction manual

Both parties will sign the checklist once all of the things are covered and both parties agree that the issues are clear for the new employee. Before signing the document, the issues should be briefly revised with the new employee and give him/her a chance to ask if any of the topics remained unclear and he/she would like further instructions on the issue. The signing of the document could be done as part of the suggested follow-up meeting of orientation (subchapter 4.5). This would be a chance to make sure that the new employee feels confident about the introduced topics and activities and is ready to work independently. Even though the documents are signed, it does not mean that everything should be completely clear for the new employee. Of course asking of questions and support should be encouraged after the follow-up as well. The primary idea of the checklists is to ensure that all important things are covered and to provide a clear structure for the orientation. This type of checklist is beneficial for all employees who give orientation but especially for the ones who give workplace orientation or job guidance for the first time.

4.3 Training for the employees who give orientation

As stated in the subchapter 3.6.1, the employees who are assigned to give orientation are not provided with training for the task. In the theory of orientation, providing training is mentioned as one of the important preparations and the key success factors of effective orientation programs. Thereby, the author suggests that training for the workplace orientation and the job guidance should be implemented in the organization. As giving orientation is part of the job description of all employees, an organization wide training session that all teams would attend should be organized.

In the training, the program should include the effective methods of explaining and teaching the topics to be covered in orientation and the importance of open communication and encouraging new employees to ask questions. A positive and supporting work atmosphere is an important factor that allows the new employee to feel welcome and an important member of the team. This aspect should be highlighted in the training. Other included topics could be the ergonomic work methods and emphasizing them in orientation, and the safe working practises and how to explain them for the new employee. The author suggests that the first training session would be organized before the summer 2013, when a lot of summer workers who require orientation, join the company. This training should be thorough and cover the topics of effective orientation broadly because of the fact that there has not been any training for giving orientation previously. The training could be implemented as an annual event so that the issues would be revised each year before the summer peak. In case there are no resources within the organization to implement a comprehensive and effective training program, an experienced trainer from an outsourced company could be hired to provide the training. In the long run, the benefits gained from the employees’ knowledge and ability to give effective and high quality orientation would pay off and cover the costs of the training.
4.3.1 Job guidance-workshop

In addition to the organization-wide general training session, the author suggests that a more specific training should be organized in each team. Due to the suggested nature of this session, described in this paragraph, the author has named the training session as a workshop. In this event, the concentration would be on the job guidance and teaching the specific instructions of the processes. The aim of this session is to clarify the job guidance of the teams and to make the process coherent. Since all team members can be assigned to give orientation, clear common guidelines should be made for each team so that all new employees would receive the same level of orientation. This event would be led by the team leader and the focus would be on open communication, sharing of ideas and jointly forming the best possible team-specific agenda for the job guidance. The primary aim of the workshop is to increase the level and consistency of orientation in the teams. As a part of this workshop, each team should identify the activities of the team and make a specified list of things to be covered in job guidance (subchapter 4.2). The existing work instruction manuals of the team should be gone through together to make sure that the instructions are clear and comprehensive. In case there are any lacks or needs for clarification identified with the instructions, they should be updated. The author suggests that all teams would have this type of workshop before the summer next year. Giving orientation for the new summer workers will be easier, more convenient and more effective once the orientation material is prepared well and there is a clear agenda to follow in orientation.

4.4 Guidance about the operations and processes of SSC

Based on the comments in the personnel survey as well as the authors own experiences (explained in subchapter 3.6.3), more guidance about the invoicing process and other operations of Shared Service Centre should be provided in orientation. Revising the information would be beneficial also for the current employees because explaining the overall process has not been detailed before. As a suggestion, a clear instruction package about the processes in Shared Service Centre should be compiled and attached with the other orientation material. The author suggests that the package would include at least the following issues:

1. The main idea and strategy of Shared Service Centre (including the organizational chart, roles of the key actors in the organization, key competencies etc.).
2. Introduction of the most important customer organizations and how SSC serves them.
3. Employee’s role in Shared Service Centre (including the customer service point-of-view and how the employees can affect the customer satisfaction by their daily activities).
4. Introduction of each department and the teams in terms of: the team leader, amount of employees, key customers and a description of the key operations and processes.
5. A graph that illustrates the relationship and dependency of the different teams and their activities.
Developing orientation in the invoicing department and producing a work instruction manual

This package should be gone through as part of the workplace orientation. Adding this material to the orientation would increase the required time for the introduction but concurrently it would increase the quality of orientation and the employee’s understanding of the bigger picture. By understanding for example the connections between different teams and processes, the importance of customer service and how everyone can affect the customer satisfaction by their own actions, would increase the quality of the work and thereby the service of SSC. In workplace orientation, during the new employee’s first day on the job, the key issues such as organizational introduction and employees roles could be introduced. To ensure effective learning and to avoid providing too much information at once, the more specific introduction of the other teams and operations could be done after few weeks on the job, as part of the follow-up meeting (subchapter 4.5). At this point, the employee has an understanding of the tasks of his/her team and a general overview of the strategy of SSC. Then, it is easier to perceive the wider picture and connections with different operations.

Providing the information as a material package instead of a presentation at an info session would enable all employees to revise and check the issues individually. Some of the suggested information to be included in the material package is introduced in the info session for summer workers in a form of presentation (subchapter 3.2). Based on the author’s experience after attending the info session two times, the introduction of the topics in the occasion is brief and all information is difficult to take in because the presentation proceeds so rapidly. By compiling a material package about the information would ensure that all new employees can get information about the topics despite the time of year they begin to work in SSC and that the information would be easily available for all employees.

Additionally, the more detailed team-specific information about their process of responsibility should be compiled for each team separately and attached with the work instruction manuals of the corresponding team. In invoicing department, the current work instructions include explanations on how to perform the activities but the reasoning of the operations is missing. As a suggestion, the work instructions could be improved to involve the explanations why the activities are done in certain way and who the employee’s actions or mistakes affect in the process. Also a clear description of the overall invoicing process and the key actors in the process should be explained. The clearest and most effective method to describe the process would be producing a figure that illustrates the whole invoicing process and the roles of each actor of the process. In flow-through invoicing for instance, the illustration should include at least: the supplier, the end customer who makes the purchase order, how SSC is linked to both of the abovementioned and how the invoice material moves along the chain and how it is created. Also explanations on the benefits of the service centre –model for each actor in the chain should be explained in more detail. Overall, the purpose of compiling this detailed information is to increase the understanding about the whole process and the services of SSC.
Developing orientation in the invoicing department and producing a work instruction manual

4.5 Preparatory and follow-up meetings

Careful planning and preparations is one of the keys for effective orientation. To improve the current orientation process, the author suggests that after assigning the person to give orientation for the new employee, the team leader and the named instructor would have a preparatory meeting. The meeting should take place before the new employee’s first day. The purpose of this meeting is to go through the agenda for orientation, to make sure that all necessary documents are prepared and to inform the person who will give the orientation. Information should be given about the starting date of the employee, the time frame for orientation, the workstation arrangements during the orientation and background information about the new hire. Additionally, organizing the workload in the team during the orientation should be discussed since giving orientation takes time from the instructor and consequently from the joint resources of the team.

The author suggests that also follow-up meetings should be organized to control the success of the orientation. The first follow-up meetings should be arranged from one to two weeks after the new employee has joined the company. At this point, the team leader and the person responsible for giving the job guidance should have a follow-meeting where the progress of the orientation should be discussed. In the meeting, the person who gives the job guidance could evaluate how the new employee has adopted the taught activities, how well he/she is able to work independently and to analyse how much there is need for further guidance. The orientation checklist (chapter 4.4) should be viewed in the meeting and utilized as a background to discuss the activities that are already covered and what activities are still to be explained. A timeframe for explaining the remaining activities should be discussed. At the same stage the team leader should have a separate follow-up meeting with the new employee to find out how he/she feels about the job and the work atmosphere. The aim in the meeting is to identify the issues where the new employee needs more support and guidance and how he/she has adapted to the work environment. The main purpose is that the new employee feels supported and can have a chance to discuss openly about matters of concern and ask questions that have arisen during the first weeks on the job. The team leader should provide feedback to the new employee based on his/her observations and the follow-up meeting conducted with the person who has given the job guidance. The meeting is chance for the new employee to give feedback in return. In case everything has gone well and the agenda of orientation has been followed successfully, the follow-up meetings do not take much time. In every case, they are an important control measure of the process.

Another follow-up meeting between the team leader and the new employee should be arranged two to three weeks later (or once all the issues from the orientation checklist are covered). At this stage, the new employee should be able to work fairly independently. In this meeting the orientation checklist should be revised. Once the activities of the team are introduced and the new employee knows how to perform them, more detailed information about the other teams and processes could be given. As the author suggested in subchapter 4.4, a comprehensive material package could be utilized in giving the introduction.
4.6 Improving the introduction of co-workers

As came up in the research, many employees feel that the introduction of other teams and even own team members is currently insufficient. In the personnel survey came up that some respondents had been emailing with a person who was actually working only few workstations further. Currently each employee’s contact information, title, department, superior and substitute is maintained in the HelpNet-system that all employees can access through the company’s Intranet. As a suggestion to improve the recognizing of co-workers, a picture of each employee could be updated to HelpNet next to the contact information. In the system, there is already a field where a picture could be uploaded and therefore this enhancement could be easily implemented. Often the employees are in contact with co-workers from different teams and departments via email without knowing the person by appearance. In orientation, only the new employee’s own team members are introduced but not the members of other teams because of the high amount of employees in the organization. Uploading the pictures would be a convenient way for improving the recognition of co-workers, especially in the beginning of employment, when the new employee meets a lot of new people within a short time.
Developing orientation in the invoicing department and producing a work instruction manual

5 CONCLUSION

The aim of this thesis was to research the orientation process in the commissioning organization Shared Service Centre and provide tools for improving the orientation in the future. The primary research methods were interviewing selected employees and conducting a personnel survey in the invoicing department. These research methods were utilized to understand the current orientation procedures, to find out how satisfied the employees are with the orientation they received in the organization and what issues could be improved in the employees’ opinion.

As a background for the research, the author studied the theory of orientation in order to understand the characteristics of effective orientation programs. Based on the studied theory, a comprehensive research could be conducted in the organization. Orientation is the process of familiarizing a new employee with the workplace, his/her tasks and policies of the organization. The main objective of orientation is to ensure that the new employee adapts to the work environment and is able to work independently according to the company’s standards. Concept of orientation involves two main aspects: workplace orientation and job guidance. In workplace orientation, the facilities and the organization’s policies and common procedures are introduced. In job guidance, the employee is given guidance on how to perform the actual work tasks in a manner that enables him/her to work independently and efficiently.

In the research, the author evaluated both aspects of orientation in the commissioning organization and based on the results, formulated suggestions on how to develop both the workplace orientation and the job guidance. The commissioning organization has an orientation guide that is utilized as a basic structure for workplace orientation. The guide is a good tool for the orientation and based on the results, the author has made suggestions on matters that could be attached with the existing guide. As a summary, an introduction of the organization and its strategies and information about all departments in SSC could be added to the guide to improve the new employee’s understanding about the organization and the key operations.

An important tool in job guidance is a comprehensive work instruction manual that explains all processes in a clear and consistent manner. In the organization, a common policy is that all teams should have a work instruction manual that introduces the specific activities of the team. In the flow-through invoicing team of Kesko Food, the work instruction manual was missing and as a part of this thesis, the author produced such guide for the team. Another tool provided for the commissioning organization was two types of orientation checklists: one to be used in workplace orientation and one in job guidance. The aim of the checklists is to increase consistency of orientation in all teams and to ensure that all important issues and activities are covered in orientation.
Other two recommendations concentrated on the following factors: how effectiveness of orientation could be improved by providing training for the new employees and how the structure, consistency and quality of orientation could be improved by arranging preparatory and follow-up meetings. These suggestions arose based on the research results where inconsistency in orientation and lack of training for people who give orientation were mentioned. Additional recommendation for improving the recognition of co-workers by enhancing the employee information in HelpNet was suggested.

The recommendations provided for the commissioning organization are designed to be used as tools for development of the orientation process. They can be applied in all teams of SSC even though this research concentrated on the invoicing department. The main objective of the recommendations is to increase the clarity, consistency, effectiveness and quality of orientation, when implemented. After implementing the recommended tools, the effectiveness of orientation will increase and the new employee’s adapting to the organization and the satisfaction with orientation are likely to improve.
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Kauttalaskutusohje Sapuska (Internal material of SSC)


Kesätt Info 12.6.2012, Tampere (Internal material of SSC)

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Developing orientation in the invoicing department and producing a work instruction manual


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http://www.explainers.com/Articles/Four-Essentials-Effective-Work-Instructions.htm


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13062011 Kesähenkilöt SSC, Tampere (Internal material of SSC)
Personnel survey: Orientation in Shared Service Centre (translated from Finnish)

**Personnel Survey**  
**Orientation in Shared Service Centre**

The aim of this confidential survey is to research how satisfied the employees in invoicing department are with the orientation in Shared Service Centre and to identify improvement suggestions for orientation in the future. This survey is a part of a final thesis to be written for HAMK University of Applied Sciences. Answering to the questionnaire is anonymous. The response forms are for the researchers use only and will not be given to third parties. Answering takes only a few minutes. After you have filled in the questionnaire, you may drop it in the return box in the coffee lounge on 6th floor.

1. Team:
- [ ] Rautakesko/ flow-through
- [ ] Kesko Food/ flow-through
- [ ] Citymarket
- [ ] EDI-invoicing
- [ ] KT-invoicing
- [ ] Indoor-group
- [ ] Expenses invoicing
- [ ] Rautakesko/ warehouse
- [ ] Kesko Food and Kespro/ warehouse

2. How long have you worked in invoicing department of Kesko?
- [ ] less than a year
- [ ] 1 to 2 years
- [ ] 3 to 5 years
- [ ] more than 5 years

3. How satisfied you are with the received orientation on a scale from 1 to 4?
   1 = not at all satisfied... 4 = extremely satisfied
   ![Scale](image)

4. Please, mark the areas that in your opinion should be improved in orientation:
- [ ] Duration of orientation
- [ ] Content of Orientation guide
- [ ] Supplies and workstations
- [ ] IT-guidance
- [ ] Suitability of the instructor
- [ ] Clarity and width of Work instruction manual
- [ ] Introduction of other teams and departments
- [ ] Other, what: ________________

5. Have you given orientation in SSC?
- [ ] Yes
- [ ] No

6. Development suggestions and other comments related to orientation in SSC:


Thank you for your response!
Developing orientation in the invoicing department and producing a work instruction manual

Appendix 2

Orientation checklist for workplace orientation

**SHARED SERVICE CENTRE**
**WORKPLACE ORIENTATION – CHECKLIST**

<table>
<thead>
<tr>
<th>Employee:</th>
<th>Start date:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Team leader:</td>
<td>Department/ team:</td>
</tr>
</tbody>
</table>

**THINGS TO PREPARE BEFORE THE EMPLOYEE STARTS**

<table>
<thead>
<tr>
<th>✔ Area</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employment contract signed</td>
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</tr>
<tr>
<td>Non-disclosure obligation signed</td>
<td></td>
</tr>
<tr>
<td>Tax card</td>
<td></td>
</tr>
<tr>
<td>SAP-account</td>
<td></td>
</tr>
<tr>
<td>OnDemand-account</td>
<td></td>
</tr>
<tr>
<td>E-mail account</td>
<td></td>
</tr>
<tr>
<td>Access-card</td>
<td></td>
</tr>
<tr>
<td>Assigning the person responsible for job guidance</td>
<td></td>
</tr>
<tr>
<td>Preparatory meeting with the instructor</td>
<td></td>
</tr>
<tr>
<td>Schedule for orientation</td>
<td></td>
</tr>
<tr>
<td>Workstation and supplies</td>
<td></td>
</tr>
<tr>
<td>Updating employee information to HelpNet</td>
<td></td>
</tr>
<tr>
<td>Preparing the material for orientation</td>
<td></td>
</tr>
<tr>
<td>Setting dates for follow-up meetings</td>
<td></td>
</tr>
</tbody>
</table>

Time and place: ____________________________________________

Signature: ________________________________________________
Developing orientation in the invoicing department and producing a work instruction manual

## SHARED SERVICE CENTRE
WORKPLACE ORIENTATION – CHECKLIST

<table>
<thead>
<tr>
<th>Employee:</th>
<th>Start date:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Team leader:</td>
<td>Department/ team:</td>
</tr>
</tbody>
</table>

### JOB DESCRIPTION

<table>
<thead>
<tr>
<th>✓ Area</th>
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<tbody>
<tr>
<td>Introduction of SSC</td>
<td></td>
</tr>
<tr>
<td>Organizational structure</td>
<td></td>
</tr>
<tr>
<td>Introduction of Kesko corporation</td>
<td></td>
</tr>
<tr>
<td>Job description</td>
<td></td>
</tr>
<tr>
<td>Job responsibilities</td>
<td></td>
</tr>
<tr>
<td>Performance expectations</td>
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</tr>
</tbody>
</table>

### ORIENTATION GUIDE

<table>
<thead>
<tr>
<th>✓ Area</th>
<th>Date</th>
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<tbody>
<tr>
<td>Flexible working hours</td>
<td></td>
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<tr>
<td>Nexthour</td>
<td></td>
</tr>
<tr>
<td>Coffee and lunch breaks</td>
<td></td>
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<tr>
<td>Occupational Healthcare system</td>
<td></td>
</tr>
<tr>
<td>Internet usage policies</td>
<td></td>
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<tr>
<td>Personal matters (i.e. personal phone calls)</td>
<td></td>
</tr>
<tr>
<td>Workstation and supplies</td>
<td></td>
</tr>
<tr>
<td>Vacations</td>
<td></td>
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<tr>
<td>Policies about leaving the office during workday</td>
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<tr>
<td>Esmikko</td>
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<tr>
<td>Utilization of Access card</td>
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<tr>
<td>Identification card</td>
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<tr>
<td>Vouchers for freetime activities</td>
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</tbody>
</table>
### INTRODUCTION TOUR

<table>
<thead>
<tr>
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<tbody>
<tr>
<td>Emergency exits</td>
<td></td>
</tr>
<tr>
<td>Team members</td>
<td></td>
</tr>
<tr>
<td>Other departments and teams</td>
<td></td>
</tr>
<tr>
<td>Sanitary facilities/ break rooms</td>
<td></td>
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<tr>
<td>Cafeteria</td>
<td></td>
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<tr>
<td>Parking</td>
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<tr>
<td>Bike shelter</td>
<td></td>
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<tr>
<td>Smoking area</td>
<td></td>
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<tr>
<td>Meeting rooms</td>
<td></td>
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</tbody>
</table>

### OTHER GENERAL ISSUES

<table>
<thead>
<tr>
<th>Area</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Procedures with days off</td>
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</tr>
<tr>
<td>Checking the accuracy of marked working hours (month shifts)</td>
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<td>Personnel info sessions</td>
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<tr>
<td>Overtime policies</td>
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<tr>
<td>Team meetings</td>
<td></td>
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<td>First aid supplies</td>
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<tr>
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<tr>
<td>Personnel survey</td>
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</table>

Time and place: _______________________________

Signature/ team leader: _______________________________

Signature/ employee: _______________________________
Developing orientation in the invoicing department and producing a work instruction manual

Orientation checklist for job guidance

SHARED SERVICE CENTRE
JOB GUIDANCE – CHECKLIST
Flow-through invoicing of Kesko Food

### GENERAL INSTRUCTIONS

<table>
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<td>Logging in to the workstation</td>
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<tr>
<td>Y- and H- drives (purpose, utilization)</td>
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<tr>
<td>E-mail (preparing signature)</td>
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<tr>
<td>Follow-You and Scan-to-me</td>
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<tr>
<td>Keskonet and HelpNet</td>
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<td>Supply storage</td>
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<tr>
<td>Scanning and filing of invoices</td>
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<tr>
<td>Mailing</td>
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### HANDLING OF INVOICES

<table>
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<tr>
<th>Area</th>
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</thead>
<tbody>
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<td>Manual Invoices 1:1</td>
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<td>Manual Invoices 1:N</td>
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<td>Scanned invoices</td>
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<td>E-invoices</td>
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<td>Correcting invoices</td>
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</table>
Developing orientation in the invoicing department and producing a work instruction manual

<table>
<thead>
<tr>
<th>Balance form (purchase invoice)</th>
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<tbody>
<tr>
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<td>Attaching</td>
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<td>Handling of complaints</td>
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<td>Reminders</td>
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<td>Supplier-excel</td>
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**Area: Transactions**

| Date
<table>
<thead>
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<tbody>
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<td>ZIV</td>
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<td>XD03</td>
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Time and place: ______________________________

Signature/ team leader: ______________________________

Signature/ instructor: ______________________________

Signature/ employee: ______________________________