

The little book of
Induction

2nd Edition

The
CharityLearning
Consortium

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Induction

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CharityLearning
Consortium

With thanks to

Andy Lancaster, Reimagine People Development

Louisa Merchant-Locke, St Peter's Hospice

Bridges Outcomes Partnerships

Jill Leishman, North East Scotland College

Foreword

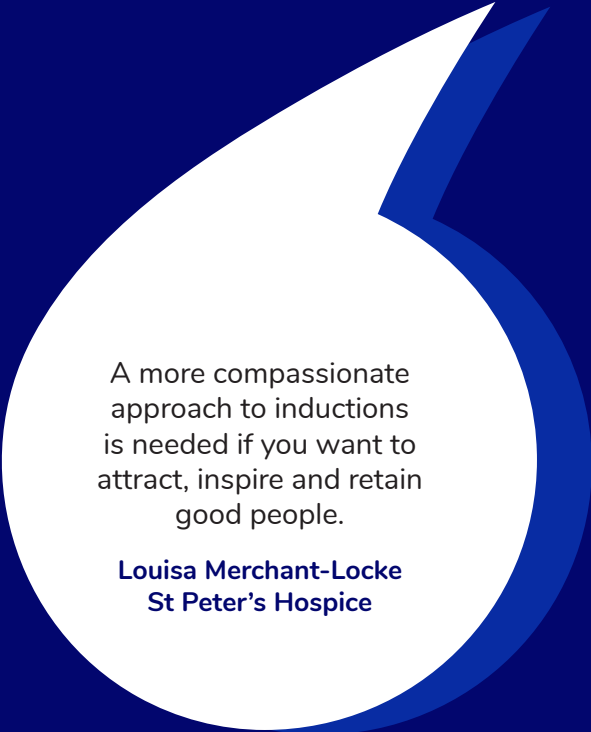
First impressions matter. Your initial experience when starting in an organisation not only has an impact on your integration but also your motivation.

Often, inductions focus solely on orientation and what we do. However, great inductions also support socialisation, to help us quickly connect and collaborate with others. Both are vital.

An effective induction has the employer and employee needs equally in mind, with creative activities and discussions on culture, values, health and safety, working environments, organisational structures and establishing a speedy route to role effectiveness.

Take care not to overdo it: when it comes to induction, less can definitely be more. We all need just enough to establish a springboard for success.

Andy Lancaster
Author and consultant
Reimagine People Development



A more compassionate approach to inductions is needed if you want to attract, inspire and retain good people.


Louisa Merchant-Locke
St Peter's Hospice

Getting it right

Finding the right staff and volunteers takes time, effort and money, so giving them the best possible start is essential.

A good induction helps people feel confident, informed and part of the team. It's about providing the right information at the right time in a way that supports them.

A poor induction can leave people feeling overwhelmed or undervalued. This can also lead to them leaving, taking you back to square one.



Don't lead with compliance.
Yes, mandatory training has
to be done, but don't make
it someone's first experience
of L&D.

Martin Baker
The Charity Learning
Consortium

First impressions count

How would you feel if you started work and couldn't access the toilets without completing GDPR eLearning so you could get a pass? Had to wait six months to attend an induction? Or were left working at home with no contact with colleagues.

Your induction speaks volumes about how people are valued: this is their first impression of Learning and Development (L&D) and the organisation, so make it a good one.

Case study: Bridges Outcomes Partnerships

When redesigning their induction experience, Bridges Outcomes Partnerships surveyed new starters from the past three years to understand what worked and what didn't.

Their Learning and Development and Learning Technology teams used the feedback to create a new programme, involving subject matter experts on topics like Safeguarding, GDPR and Copyright. Engaging different people at key stages helped ensure the content was relevant to both new starters and the organisation.

Create a working party

Creating a working party of stakeholders to help the design of your induction is an excellent place to start. Include people from across the organisation who offer different perspectives and can take ownership of both the design and rollout of the new programme.

The right people will not only share the workload but will also naturally become champions of the induction once it's ready to launch.

This group might include:

- People/HR team members.
- Line managers.
- DEI representatives.
- Internal support teams, such as IT support.

It's also a good idea to invite newer employees to join the working party. They can offer a fresh perspective providing valuable insight into the induction experience. Being involved is also a great opportunity for them to meet people from across the organisation.

Top tip

Try splitting the induction group into two. Ask one group to list everything the organisation needs from a new starter. Ask the other to create a similar list from the new starter's perspective – what do they need from an induction? This helps everyone see things from different perspectives and is a great way to create a balanced requirements checklist.

People first

A common mistake when designing an induction is focusing too heavily on the organisation's needs rather than those of new starters. Both are important and both should be considered.

Organisations often emphasise the need for people to 'hit the ground running' and focus on the information new starters need to know.

For new starters, however, it's more complex. Their priorities are often about how they feel: feeling welcomed, confident, connected and that they belong. They also value having a clear roadmap to help them succeed.

Top tip


Nesta, an agency for social good, asked their stakeholder group to choose three words from a list of six that captured their intentions for the new induction. The options were: Belonging, Mastery, Purpose, Inspiration, Confidence and Clarity. Could a similar activity encourage a meaningful discussion in your stakeholder group?

Agree a goal

It's important to agree on a clear goal at the start of any project and your induction is no different. Make it a measurable goal and you'll really start to rock.

The key is to focus on solving the problem you're facing. Is it a retention issue? Low staff satisfaction scores? Whatever it is, place your goal at the centre of your design and use it as a benchmark for every decision you make.

Next, review your current induction programme. Create a list of what's working well and what isn't. Keep the good parts, but don't be afraid to recognise what needs to change.



Strong induction
processes can improve
new hire productivity by
over 70%.

Glassdoor

Walk in their shoes

Induction is more than just learning. It's about helping people feel part of their new organisation and engaged in delivering your mission.

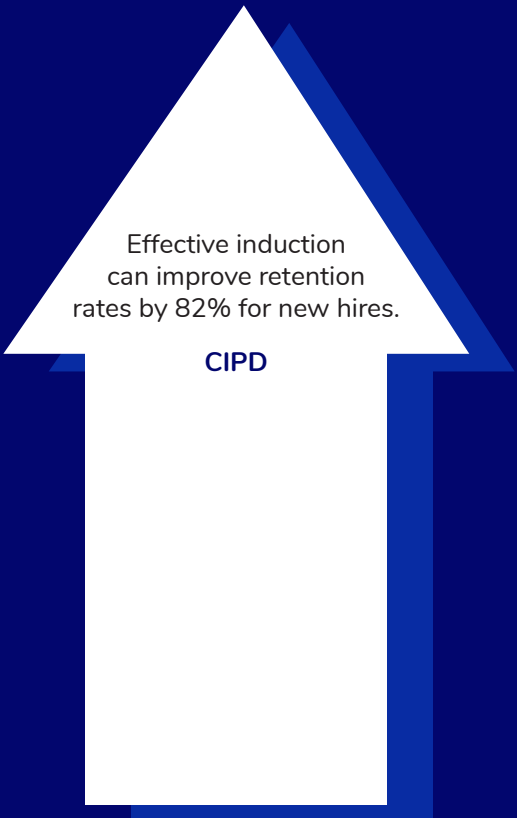
Try following the journey a new starter takes in their first few weeks:

- Where are the bottlenecks, frustrations and points of confusion?
- What improvements can be made?

Based on your experiences, work with your stakeholder group to identify how you can streamline the process. Could you:

- Move tasks online?
- Adjust or combine some mandatory requirements to simplify the process?
- Merge some of the forms?

Don't forget to consider how your induction programme might differ for people transitioning internally between roles.



Effective induction
can improve retention
rates by 82% for new hires.

CIPD


Break it up

When designing your induction programme, it's helpful to think of the process as four parts:

- 1. Corporate** – Information about your organisation's history, structure, culture and finances.
- 2. Organisational** – Operational details such as policies, administration and regulations.
- 3. Team-specific** – Logistics relating to the team, manager engagement and social integration
- 4. Role-specific** – The knowledge and skills an individual needs to succeed.

Consider what might be required in each of these areas to meet the needs of new starters. How will you address each one and where should they fit in the induction process?

The corporate and organisational parts are best handled centrally, while the team and role-specific elements can be delivered by line managers, supported centrally with training, guides, checklists and resources.



We recognise that people
are our best ASSET and that
you only get one opportunity
to make that great first
impression.

Louisa Merchant-Locke
St Peter's Hospice

List your requirements

It's time to create a detailed list of what you need to include in the corporate, organisational, team-specific and role-specific inductions.

The stakeholder group should work together to brainstorm and identify the areas that will need to be covered. Don't forget to continually reflect on the needs of both the organisation and new starters.

Once you have this list, share it with a range of stakeholders for their feedback.

Case study: St Peter's Hospice

Each new employee now uses an onboarding portal that contains all required documents to read and sign. Centralising these files has improved the process by reducing the chance of lost paperwork and helping employees track outstanding tasks.

Digital signing via mobile makes the system more accessible, particularly for those without laptops or computers. Since the introduction of the portal, 100% of surveyed employees have rated it as 'good' or 'excellent'.

Design a great experience

- Think about how you can build an induction experience that is comprehensive but doesn't overwhelm people.
- Be creative with how you deliver content, you don't want their first impression of the organisation to be deadly dull.
- Could you give new starters a welcome pack and/or gift?
- Ensure mandatory training really is essential. Could this be integrated into other tasks they are doing? For example, shadowing someone, completing training and then carrying out the task alone.
- Welcome buddies can really help with orientation. A buddy could be anyone, including line managers, as long as they can dedicate time on day one and beyond.
- Consider the needs of people with accessibility requirements, including those who are neurodiverse.


Top tip

Create a map that shows the elements included in the induction and where help and support are available. This is a great visual alternative to a checklist.

Brand it

Could you create a name and brand specifically for your induction? This will give the programme a sense of identity and signal that the organisation values its induction process. It can also help new starters to feel part of the programme and recognise what resources are part of that journey.

Branding is also a useful way to communicate your intent to the wider organisation and encourage buy-in from managers and senior leaders. Make sure all materials are professional, well-designed, consistent and on-brand.



We took a 'scattergun' approach to communication, using multiple channels to maximise reach—knowing that while no single method will reach everyone, using a variety increases the chances that the message gets through.

Jill Leishman
North East Scotland College

Ensure everyone knows

A strong communication plan ensures everyone understands what's involved, recognises the new brand and knows how to support it.

This is especially important if new starters are expected to complete tasks or engage with different teams. If existing employees aren't aware of the programme, they won't be able to provide the support needed to make it effective.

It's also valuable for colleagues who may one day step into line management roles. The more familiar they are with the programme, the better equipped they'll be to guide new starters when the time comes.

By promoting your induction programme widely, you help create a culture where welcoming and supporting new starters is seen as everyone's responsibility, not just HR's.

Top tip

If new starters don't have access to your LMS until they start, why not host your pre-induction resources on a private web page for easy access.

You can then send them the location with their contract paperwork.

Grab them while they're hot

Providing new starters with pre-induction materials is a great way to get them started while they are keen and receptive. Keep it simple, avoid information overload and focus on what will make their first day and week easier.

A pre-induction might include:

- What will happen on the first day and week.
- How they should engage with their team and manager when working remotely.
- What is expected of them when coming into the office. Is there a dress code? Where should they go?
- Availability of refreshments, recommendations of local shops and restaurants.
- Overview of the induction process and their role in the process.
- A light introduction to the organisation.

Top tip

Delivery options could include welcome booklets, LMS course pages, bespoke and off-the-shelf elearning, videos, audio clips, job aids, on-the-job coaching, job shadowing, customer and supplier visits, webinars or live online learning.

Delivery options

It's now time to map your induction requirements to the resources you have available to you. You don't need a big budget, just a bit of research and creative thinking. Options might include:

- **Curation:** Find existing resources within your organisation. You may not know everything that exists, so make sure you look under every rock, folder and social media platform. You can also use resources outside the organisation such as materials from the Charity Learning Consortium or online media like YouTube.
- **Creation:** Develop your own content. This could include filming short videos, recording audio clips, creating animations with online tools, building simple eLearning, or designing resources in Canva or MS PowerPoint.
- **Commission:** If you want one or two stand out pieces (and have some budget) work with a commercial organisation to build some core elements of the induction. A good supplier will help to create a consistent brand that can be used in other resources.

Case Study: North East Scotland College

North East Scotland College recognised that new staff were keen to connect.

To support this, they introduced Employee Connections, a speed-dating-style session at the end of each term.

Discussion cards guide conversations from light, fun topics to work-related reflections, helping new starters share experiences and learn from each other. The sessions have been a real hit, with excellent feedback.

Making connections

Helping new staff integrate into your organisation is vital to ensuring they are happy and successful. This is particularly true if they work at home or in a hybrid working environment, here are some ideas to support them:

- Microsoft Teams groups and apps like WhatsApp allow people to share their experiences and ask questions.
- Coffee mornings or cake sales, perhaps raising funds for your charity, can help new starters meet people from other teams.
- Pairing new starters up with a buddy outside their team has various benefits. It can help them learn about all aspects of your organisation's culture, network with others and help avoid people working in silos.
- Instead of running time-sensitive induction sessions, how about running lunchtime sessions a couple of times a year for new and existing staff?

Top tip

Could you set up short, purposeful “missions” that directly contribute to current projects. For example, a new starter might help the fundraising team draft a short thank-you message for donors or join a service delivery team to prepare for an event.

Create experiences

Think outside the box and instead of pushing information onto new starters, as if they are the proverbial vessel to fill, find ways to get them to gather information themselves.

Consider running 'experience' sessions instead of 'induction' sessions, where new starters work with different departments to complete tasks.

This allows them to learn what other teams do through experiencing their work. They will also be able to engage with them in an informal but focused way.

Top tip


Imagine the difference in take-up between a piece of eLearning called 'Corporate induction' vs. one called 'Ten things you need to know about us'. A simple change in wording can make a big difference in take-up.

Share the joy

Creating and curating online resources can take time. While it's useful to develop an induction brand, consider keeping the resources themselves unbranded. This makes them easier to reuse in different contexts and extends their value.

For example, you can deliver a piece of custom eLearning on a branded course page on your Learning Management System (LMS) but avoid using the induction brand name on the resource itself.

Resources created for new starters may also be valuable to all staff and volunteers but they won't engage with them if they think they're only for newcomers. Make them accessible to everyone via your LMS to maximise their impact.



Line managers are the 'engine' of organisations: building teams, encouraging performance, supporting well-being, facilitating learning, monitoring progress and ensuring success.

Andy Lancaster
Reimagine People Development

Get managers on board

Support from line managers is vital. They can become the weak link if they don't:

- See the benefits of the induction programme.
- Dedicate the time required.
- Understand their role in the process.
- Know where to find help and support.
- Familiarise themselves with the whole programme, not just their own tasks.

You must ensure that line managers are given information, training and support to succeed.

When launching a new induction programme, train managers on the new process. Sell the benefits making it clear that new starters will be more productive, effective and engaged.

Ensure everyone understands their role in the process and how they contribute to its success.



Top tip

Taking part in annual 'Best Companies' type surveys will give invaluable feedback to help shape everything you do.

Don't skip the pilot

It's now time to pilot your induction. No matter how well-planned, it's unlikely to be perfect without some real-world testing.

How you approach this will depend on your organisation's size and the number of new starters. You might choose a fixed trial period to gather feedback before refining it, or test it with a small group of new employees before a full rollout.

By this stage, you might be eager to move on to new projects, but don't let that undo all your hard work. A few final tweaks can make the difference between an induction that simply works and one that truly delivers.

Case study: St Peter's Hospice

The organisation's aim was to remove fear of the unknown, provide complete clarity at every stage and motivate new starters about their upcoming induction.

Feedback and engagement with the new induction programme has been extremely positive, with new employees reporting that they feel valued and 'seen and heard'.

The focus has shifted towards prioritising the individual's experience, rather than simply how quickly they can be placed in post.


Continue to monitor

After launching your new induction, it can be tempting to move onto the next project. But organisations don't stand still and improvements will always need to be made.

Build feedback and evaluation into your induction process to ensure it continues to improve and adapt. Gathering feedback from new starters is an obvious start, but don't forget to include all the key stakeholders. Use a range of different ways to collect your feedback at key points such as the first week, month, three months and when they complete the process.

Methods of gathering data might include:

- Asking for feedback (named and anonymous).
- Speaking with managers, new starters and senior leaders.
- Keeping in active listening mode to continue to make connections with changes in the organisation that might impact the induction.
- Analysing staff survey data.
- Reviewing completion rates on your Learning Management System (LMS).



Sharing our story on a national platform and being able to tell senior leaders about this, highlighted the dedication, effort, and passion that has gone into this project. It was a powerful reminder that the work we're doing is not only meaningful, it's making a real impact.

Jill Leishman
North East Scotland College

Shout about the impact

Your induction is live and you've gathered feedback but the work doesn't stop there. It's vital you show the impact its having on the organisation. Don't keep success in the shadows. Shine a light on the difference it makes to new starters and the organisation.

Share stories, quotes and feedback in reports or meetings. Keep these visual so they are clear and engaging. Celebrate both small and big wins.

When you talk about the impact, use the language of your organisation, not L&D. Link your results to KPIs, SLAs and the charity's goals. Make it clear how induction helps people settle quickly, stay longer and contribute faster.

Be proud of the work you've done. Recognition matters and so does the story you tell.

About the Charity Learning Consortium

We are a one-stop shop, dedicated to providing affordable and effective learning solutions for charitable organisations. Membership includes a suite of eLearning, charity-specific video content, a learning management system and access to a vibrant community for members to connect and share good practice. You also get a whole host of other goodies as part of an annual subscription.

Hundreds of charitable organisations benefit from collaborating with us. Bringing them together enables the Consortium to offer cost-effective, quality eLearning to more than a million people across the UK. Our collaborative approach paves the way for learning and development success, with ongoing support, fantastic networking opportunities, relevant workshops and an inspirational Charity Learning Conference & Awards.

charitylearning.org

About the author

Gill Chester

Gill Chester is the founder and Director at Little Man Project. She has worked in learning and development for more than 25 years.

Little Man Project is an award-winning eLearning design and development company that specialises in working with voluntary sector clients to develop sustainable solutions to meet their learning and development needs.

They also run a 12-month blended learning programme called Elearning Unlocked that helps charities design and create eLearning in-house.

littlemanproject.com

elearningunlocked.org.uk

‘A thoughtful induction isn’t just about ticking boxes – it’s about giving people the best possible start. When people feel welcome and supported, they’re able to bring their best selves and make a real impact’

Martin Baker

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