

# IIAT Mentor's Guide to Employee Orientation

## Congratulations!

Congratulations on getting the position filled in your agency. The process of finding the right person for a job can be long and difficult, but it's important. Just as important however, is the process of getting the new employee comfortable, oriented to the tasks ahead of them, and productive for the organization.

This guide is intended to suggest some structured approaches for getting your new employee settled in and onto an accelerated learning track that we hope will reduce the amount of time you would ordinarily spend in orientation and initial training.

**RECOMMENDATION:** This guide and the employee's version are designed to be used concurrently section by section from the first day of employment. It will help if you stay slightly ahead of the employee so you can be prepared to answer their questions, make assignments, and plan your schedule for meetings and training. Read all of this Mentor's Guide Introduction before guiding the employee to Part One of the Employee Guide.

In this guide, and in the employee's version, are many different tools and exercises that can be used during the orientation process. Each has a practical application, but may not necessarily be helpful for every type of employee. You will need to decide as you go what parts of the guide may be best for the employee to skip or review lightly. Below are some of the tools we've included in the guides and a discussion regarding their use in the orientation process.

### What's Inside

#### 1. Suggested meeting agendas and discussion topics

Any employee new to an organization has many things to learn, and nothing is more helpful than regular face-to-face communication with someone giving them guidance and counsel. Considering the sheer number of important things you may want to discuss with the employee, this guide offers you suggested agendas for meetings on subjects commonly important to insurance agencies and their new employees. You should feel free to add to or disregard any agenda items as desired to be consistent with your agency goals or the needs of a particular situation.

Some of the discussion topics suggested in your guide, and in the employee's version, are intended to round out the new employee's knowledge of the industry and your agency, giving them a context to better understand their role and how they can contribute to the agency's success. Remember, what may be old hat to you about this business can be baffling to a newcomer without some background and history.

## 2. Sample schedules for meeting with the new employee

One of purposes of this orientation guide is to save time. By structuring the time you devote to training the new employee, you hopefully will have more time for your regular duties. Establishing regular schedules for meetings, coaching sessions, lessons, and assignments can also build disciplines that will help the new employee learn quicker and appreciate the value of efficiency in your agency's operations.

## 3. Checklists

Keeping track of the employee's progress using checklists can help you move the process along without overlooking important components of their training. It's also interesting to note that to some people, completion of a checklist can represent a positive symbol of accomplishment and source of encouragement.



## 4. Suggested assignments for the new employee

The guide includes assignments designed to accomplish a variety of learning goals. There are assignments that help the new employee relate to others in the office, learn the computer system's capabilities, grasp the coverage provided to customers in various policies, develop their customer service skills, and much more. Many of the assignments call upon the new employee to work independently with a minimum of guidance or help from others. As you move through the orientation process, you will hopefully be able to gauge how quickly the new employee works and how much time to allocate to each assignment. (An estimate of the time required for each exercise or assignment is included, but your experience may vary.) Your job will be to follow up with the employee in subsequent meetings to see if they completed the assignment completely and correctly, and to answer their questions regarding the subject at hand.

## 5. Suggested reading

In the guide are reading recommendations for the new employee that include books and items found on websites (many of them at [www.iiat.org](http://www.iiat.org)). These can provide a deeper level of information helpful to the employee in many areas. Some of the readings have accompanying questions for review and discussion during mentor/employee meetings.

### **Mentor Action**

The education staff of IIAT recommend that you consider the purchase of a book published by the American Institute for Chartered Property Casualty Underwriters / Insurance Institute of America, Inc. called *Introduction to Property and Casualty Insurance* for use by your employee during the orientation process. This relatively short (120 pp.) paperback is a very well written, easy to read, relatively thorough introduction to the industry for a beginner of any age. The employee's guide suggests readings in this book. It's 11 chapters should also help shorten the time required of you to explain many aspects of the business of insurance. IIAT receive no proceeds from the purchase of the book. It is simply a good suggestion for an addition to your agency's library.

Although the book will serve as a helpful tool to your employee's orientation, it isn't necessary for the use of the orientation guide, even in the parts of the guide that suggest chapter readings. An experienced agent should be able to help the employee answer the exercise questions that follow each reading.

There is a supplemental study guide published to compliment the book should you wish to use the book as part of the Institute's self-study course in General Insurance.

**To order call the American Institute for CPCU/IIA**

**1-877-284-5060 or go online.**

**Anyone in customer service can assist with the purchase.**

### **Special Offer**

At the end of Part Eight – Career Development, there is a special discount offer for your new employee who enrolls in any of IIAT's Essentials classes (Commercial, Property or Life & Health). Get your employee's career started right while your agency saves money.

## **6. Research projects**

A career in insurance is a career of learning and adapting to new regulations, new forms, and new products. The guide includes assignments where the new employee is asked to find particular answers to questions common with customers and agents. The projects should provide your new employee exposure to key resources and practice in finding answers to their questions, a skill that will only help them be more self-sufficient in the serving customers.

## Meeting New Employee Needs

The reasons that employees take a particular job are as different as the individuals themselves. Their motivations could include any, all, none, or some combination of the following.

- A steady paycheck
- A chance to make big money
- Work with people they know
- The work atmosphere of the office
- Work location
- Something to do with their time
- A challenging set of responsibilities
- An opportunity to gain experience
- An opportunity to be promoted or advance
- A chance to get someone else to train them in a new profession
- A professional career



Do you know what really motivated your new employee to join the organization? If not, perhaps you should try and find out. Understanding their motivations may help you greatly in framing the way you coach them, guide them, and encourage them during their orientation.

### Example:

Priscilla lets her mentor know during a meeting her first week that her motivation for taking the job was primarily a chance to interact with people daily in a customer service atmosphere.

Knowing this, her mentor might want to let her know how each skill she masters will improve her ability to excel at customer service.



If Priscilla were motivated by the opportunity to work with some of the customers of the agency who are well known in the community, what could her mentor emphasize during training to focus her attention?



What if she was motivated by the chance to turn the job into a career?



What if she just liked the downtown location of the office?

## Starting Where They Are

It's not realistic to expect people to be other than what they are. Instead as a mentor, you can meet them where they are and help them see that the job they have begun can meet their expectations if viewed from the right perspective. If the employee looks forward to working with important clients, the mentor could reinforce the need to build the highest level of skill in order for agency management to entrust to them their most valued clients. If the employee is motivated by the career opportunities, the mentor can reinforce the step-by-step nature of learning the business. If the motivation is more simple like pay or location, the mentor could remind them that the agency only employs the best people who can meet service expectations.

## Your Role as Mentor

As your new employee's mentor, you have a very important job. The attitude they have about your agency, our industry, their potential career will in large part begin with the way you handle their first few weeks. Being a mentor is about:

- teaching and leading
- being helpful
- being both coach and cheerleader
- making them self-sufficient and self-starting

## Remembering the Fears of New Employment

Everyone can tell a story about concerns they had in a new job. Will I be able to do this? Will I enjoy it? Will people like me? Will they follow through on what they promised?

Helping a new employee overcome their fears can be easily done with clear communication, enthusiasm, and empathy with their uncomfortable situation. Hopefully, the structured approach to orientation recommended in this guide will help your new staff member feel at home more quickly by helping them understand the agencies expectations, goals, and culture.



### New Job Enthusiasm Killers

- Unexpected duties
- Feeling all alone
- No training provided
- Raised voices / short tempers
- Inaccurate blame for mistakes
- Emphasis on the negatives in the personnel policy
- Horror stories about other employees
- Information overload

### ***Mentor Exercise***

Things I want to remember to do (or not do) to help our new employee feel comfortable:

1.

2.

3.

4.

5.

### **Planning, Meeting and Accountability**

This orientation guide is designed to help mentors structure the first weeks of employment to benefit the new person on staff, but it also is intended to help the mentor by saving time. Key to realizing those time savings will be the care given to planning your interaction with the new employee. The goal is to structure each day and week to allow the employee to learn as much as possible on their own while receiving guidance, instruction, and encouragement from their mentor at regular intervals. Here are some time management issues to which you will want to give some thought.



### **Regular Meetings**

Your new employee will need your attention and direction a great deal in their first weeks. How many meetings each day will be best for the employee and best for you? Too many meetings may waste your valuable work time. Too few meetings may leave the employee idle, delaying the day when their contributions to the work are seen.

## Schedules

The only way to make your meetings regular is to set them on the daily, weekly, or monthly calendar. Consider the best times of day to meet – early morning? immediately before or after lunch? at the day’s end? Consider making the meetings firm appointments that both you and the employee will plan for and around. This guide is written to help you make the most of these meetings by reviewing assignments and answering questions. Although adjustments, postponements, or even cancellations of certain meetings will undoubtedly happen, the discipline of scheduling and planning will only help the employee and build an expectation that time at work should be managed. If your office uses a calendar format or scheduling software, you may want to orient them to your system early.

## Question and Answer Sessions

The employee’s guide suggests they ask their mentor questions related to various topics during meetings. You are encouraged to play along with these prompted conversations allowing them to explore and learn by asking. In most cases your guide will clue you in to these in advance. You should respond to each however you feel is best for the employee and the agency, but remember, people learn faster by doing things themselves than by just hearing. Make asking questions and exploration a safe thing to do for the employee.

## The Goal - Learning

The goal of employee orientation is learning. It’s important for the employee and the mentor to keep that in mind. This means setting achievable goals for each day and each week. This guide offers suggested learning goals to that end; however, you as the mentor, know best what the employee will need in their job. Set goals that they can understand. Let them learn and practice on their own when possible, or with others when needed. Follow up to see if the desired learning has taken place. Keep them on track.



The new employee will need to know how they are doing from time to time. If you use a checklist of orientation goals, let them know about their progress and what lies ahead. Keep an eye out for a learning pace that is too slow, too fast, expects too much of the employee, or leaves them bored.

# Sample First Week Schedule

	Monday	Tuesday	Wednesday	Thursday	Friday
8	First Day Meeting	Orientation Meeting	Orientation Meeting	Orientation Meeting	Orientation Meeting
9		HR chores Work space, phone and computer orientation		License exam research and planning	Observation
10	Orientation Guide Part One Assignment		Personnel manual reading, more staff reviews		Info Central Orientation
11				Observation	
12	lunch	lunch	lunch	lunch	lunch
1	Orientation Meeting	Staff Interviews	Automation system tutorial	Orientation Guide Part Three Assignment	Reading Assignment
2					
3					
4	Orientation Guide Part Two Assignment	Orientation Meeting	Orientation Meeting		
5					Planning Meeting

## The Plan

This guide and the employee guide are intended to work together. In order for you to be prepared for employee questions, it is recommended that you review each part of the Mentor Guide and Employee Guide ahead of the employee.

The guides will follow the following path toward orientation.

Part One	Goals, expectations, meeting with your mentor, and insurance agency basics
Part Two	Getting settled in your surroundings
Part Three	How insurance works
Part Four	Learning agency procedures
Part Five	Considering the right coverage for customers
Part Six	Customer service issues and techniques
Part Seven	Errors and omissions basics
Part Eight	Professional development planning

Should you have suggestions, comments, or questions about the New Employee Orientation Guide or the Mentor's Guide, contact Paul Martin, Director of Education for IIAT at [pmartin@iiat.org](mailto:pmartin@iiat.org) or call 800-880-7428.