

# **Eight Hours in Two-Hour Shoes - The Introductory Period**

By Lesley Sifers, Tax Favored Benefits, Inc.

In many companies, the new employee's first several months of employment is known as a "trial period." While this period has no special significance in employment law, it remains a useful management tool. During this time, you not only can evaluate the employee to see if they are a good fit for your business, but the employee can also discover whether or not they like the company, the work and their new co-workers.

**What's the difference between "introductory period" and "probationary period"?** There is no legal distinction. "Probation" sounds punitive – as if you expect problems. Is that the first impression you want to give a new employee? The real objective should be to get acquainted. "Introductory period" more accurately describes that purpose.

**How long should the introductory period be?** There is no hard and fast rule. In general, three months is about the right length. Anything less doesn't give you or the employee time to show your "true selves." Anything longer is demoralizing for an employee. Some companies set the introductory period to coincide with benefit eligibility. If that works, fine, but don't make it the determining factor. The requirements of the position remain more important. For instance, in a job with monthly deadlines, you may want a new employee to experience a cycle or two so you can see how they perform under pressure.

**What activities should be undertaken during the introductory period?** While most large companies offer formal orientation programs, a smaller version can be designed for any employer. In the absence of a formal program, this period is usually when the new person learns how to do the work. Often, a departing employee conducts the initial training and, in most cases, that's a mistake. Consider using a "buddy system" where a trusted employee is charged with training the new person. This can be a rewarding experience for the trainer and a more productive situation for the new person. Bottom line, you want someone who still maintains a vested interest in your firm in charge of training new people.

As the manager, be cordial to the new person and let them know you are available if they have questions or problems. Resist the impulse to personally monitor every detail. After all, you have better things to do. Remember, if you hover about all the time, the new employee will never let down their guard and you will not see his/her true behavior. Instead, ask the trainer for periodic updates. A good trainer, who understands your expectations, will be truthful about the new employee's strengths and weaknesses.

Be sure to address even the smallest problem during the introductory period. New employees come to you from varied backgrounds and experiences. People presume that what was acceptable at their last job is fine at a new one. Helping the new employee understand the job, your company culture and expectations remains the real goal.

Even the smallest company should implement some form of performance evaluation system, including an interim review specifically designed for the introductory period. A one-page checklist format is sufficient. Midway through the introductory period, sit down with the employee to discuss his/her progress to date. Remember, this is a crossroad – direct the employee down the right path with encouragement or correction. Don't save up criticisms or praise for this review. Address problems when and if they occur and acknowledge achievements as the new employee grows.

**What do we do if the employee is not making progress or we are not satisfied with their behavior?** One of the greatest benefits of a formal introductory period is that you remain under no obligation to follow your own progressive discipline policies. Most terminations, regardless of length of service, are due to unacceptable behavior – not an inability to do the work. Watch for behavioral patterns and hold new employees to a high standard. Absence, lateness, complaining, defensiveness, excessive visiting or personal use of company property are all sufficient reasons to end employment. If the infraction is very minor, tell the person that such behavior is not appropriate and if you have three or four “minor” problems, think long and hard about the pattern.

You may feel reluctant to release a person after spending time and resources to recruit and hire them, not to mention the time spent in training. Don't let that stop you from discharging a new employee who remains marginally satisfactory. If you wait, it will become more difficult to terminate the employee and avoid repercussions. It's much better to cut your losses and try again than to retain a person who is likely to become a management headache.

**When does the employee become a permanent employee?** The short answer is, “Never.” Volumes of employment case law have established “permanent” to mean “forever,” regardless of performance, attitude or conduct. Use a term like “regular” employee to denote someone who has completed the introductory period. Make this distinction clear to people when you hire them. Too many people think that successfully completing the introductory period equates to a “permanent” job. They struggle to be on their best behavior for a few months under the false impression that, in future, they are immune from being fired. Make sure everyone understands “at-will” employment.

For most employees, the end of the introductory period is a milestone. As a manager, acknowledge this as a transition to the team. A performance evaluation remains a good tool even if there is no change in compensation. Most people want to know where they stand and an honest evaluation at this time will hold a greater impact than any assessment you will ever conduct in the future.

**How do we communicate the introductory period to new employees?** If your business has a handbook, explain the introductory period in detail. It's always best to hand a new employee something in writing, especially since spoken communication is never delivered the same way twice. Everyone needs to understand this company policy in the same way. It remains equally important to train supervisors and “buddy system”

trainers. Both must understand the company objectives, processes and procedures if the introductory period is to be of any benefit to your firm.

One important concept to communicate is the “no-fault” nature of the introductory period. For instance, if an employee chooses to leave, they need to understand that there will be no hard feelings. You also need to communicate that you may ultimately decide that the employee is not a good match for your business. (It would be of no value to the employee to be retained in a position for which they are not suited.) Don’t forget your supervisors and trainers. Assure them that when a new hire doesn’t work out, it does not reflect upon their ability to select or train people. Placing blame on your trusted employees serves no useful purpose.

The title of this article comes from something my spouse often says, “I’ve walked eight hours in these two-hour shoes.” (Usually, that’s during/after a dance, museum tour or similar activity.) The only good thing about tight shoes is getting home so you can take them off. The same is true for the introductory period. It’s just a question of determining a proper fit.

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