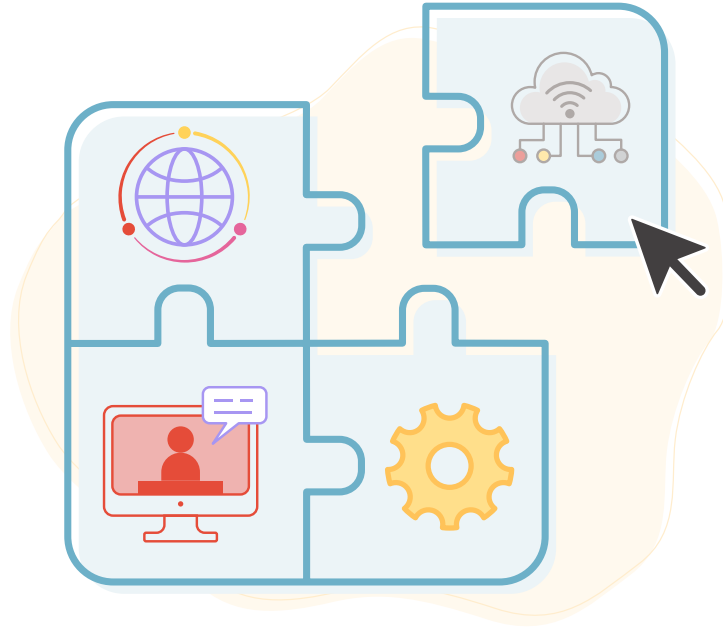




Congrats, you have a new hire! Whether they're starting as a full-time employee, a part-time role, in a temporary position, as an independent contractor, or something else, a new person is joining your team.

You're excited! They're excited! The whole team is excited! And that excitement level will never be higher than your new hire's first day and week. A well-planned onboarding process can help the whole working relationship start well and maintain engagement long-term.

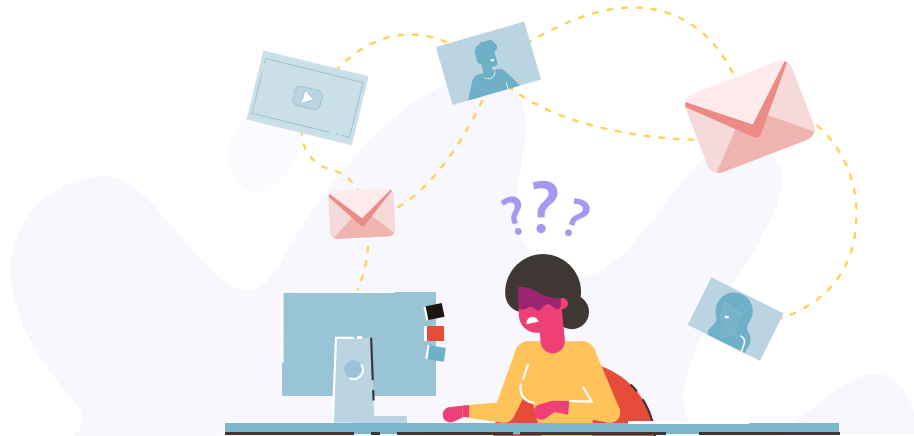
## ONBOARDING MATTERS



A great first day can lead to a successful long-term employment relationship. However, a poorly planned and bumpy first few days rarely ends well; it's hard to recover from a bad first day. Finding and hiring the right talent for your team is just the start of the employment relationship. It's difficult, time-consuming, and costly to find the right person, and heartbreaking to see all of that effort go to waste. No matter the role, pay, benefits, perks, or opportunities offered, taking a new position can feel risky.

If your new hire does not feel welcomed, connected, engaged, and confident in the decision they've made on their first day and first week, they can start to question their choice. By providing an excellent onboarding experience, you can assure them that joining your team was the right decision.

## REMOTE ONBOARDING MATTERS EVEN MORE



When your new hire is working remotely some or all of the time, building these connections and confidence early on is even more critical. And more difficult.

Onboarding a new remote employee requires planning and organization. You can't just have someone show up at the office, take them to their desk, and ask the co-worker sitting next to them to "show them the ropes." As a result, many established companies with well-planned in-person onboarding processes are struggling to integrate and retain new team members who work remotely.

Put yourself in the shoes of a newly hired remote employee. You are starting a new job where most or all interactions have been through a computer screen. Likely, you've only met your manager or team members virtually, if at all. And you might never visit your company's headquarters, whether you're in the same city or a different state. So, all told, you're starting this new job more disconnected than any employee that shows up at the office on their first day. It's the ultimate "first day of school, and I don't know anyone" scenario.

Day One of the new job you walk down the hall to your "workspace" (probably in your home) and...?? What happens next is an indicator of how this whole employment relationship is likely to go.

## CREATE YOUR REMOTE ONBOARDING PLAN

The good news is that you can create a remote onboarding experience that's just as successful as the in-person version is (or was, because some companies are never going back).

To get started, think through how you would onboard a new in-office employee and the questions they might have. Then, for each step, how can you replicate that experience in a virtual environment?

### 1. **Welcome your new hire to the company – They've accepted the job but still don't know everything about your company.**

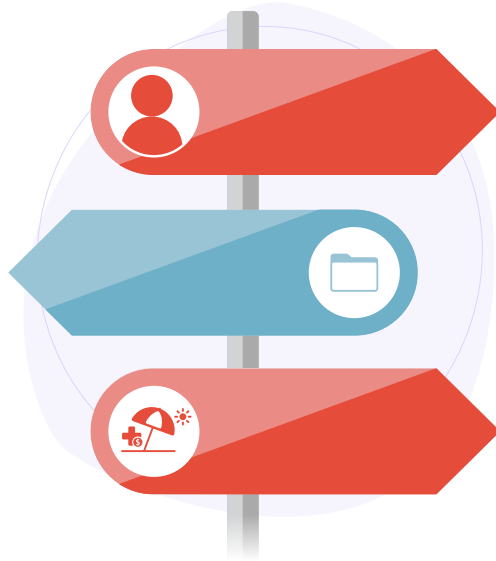
- \* They're wondering: "What's it like?" "What's the culture?" "How are new hires welcomed?" "Will I feel welcome?"
- \* Before their first day, send a physical or virtual Welcome Kit with information about the company, including structure, culture, values, employee resources, and other details only insiders would know. They're one of you now, so make them feel like part of the team. Include fun and useful company-branded items to use in their virtual office so they can feel connected to the company no matter where they work.
- \* Notify your team of the new hire's start date and schedule time to welcome them. A quick 'welcome to the team' video call at the start of their first day can go a long way in making someone feel included. How would you greet them if they walked into the office that morning? Create the remote version of that.

### 2. **Get them set up with equipment – For your new hire to be productive right away, they'll need required equipment and systems access.**

- \* In the interview process, you probably covered what equipment the company would provide. But they're still wondering, "what exactly am I getting?" "When will I get it?" "What if I have trouble setting it up?"
- \* Coordinate with your IT or office management team to ensure all of the physical equipment they need, along with passwords and login links, are sent to arrive before their first day.
- \* Provide contacts and instructions on how to get help if they have any issues setting up equipment or logging in.

#### **Onboarding is More Than Sending Equipment!**

The biggest remote onboarding mistake we see is where companies do only this step and nothing else! New hires need more than a laptop and mobile phone to be successful.



- 3. Show them around (virtually) – Cover where and how to access or find what they need.**
  - \* Answer questions like “how do I access the network?” “Is there a server?” “What software platforms do we use?” “How do I get office supplies or other items I need?”
  - \* Schedule an equipment and technology review for their first day to ensure everything is working and answer any questions. This meeting can be with a co-worker who uses the same equipment and systems or an expert on your team who can confidently answer questions.
  - \* Share your screen and give your new hire a “tour” of all the systems and platforms you use. Confirm they have access to and can see what you see!
  
- 4. Review benefits and policies – This is standard and necessary, whether the employee is remote or in-person.**
  - \* Be sure to include remote-specific items like work hours and scheduling expectations, along with fun details like virtual happy hours or lunch get-togethers.
  
- 5. Explain team communication – Every company and team has norms and expectations for how they communicate; be sure to share this with your new hire.**
  - \* They need to know “when and how do we meet?” “What tools or platforms do we use?” “Are we on Zoom, Google Meet, MS Teams, or something else?” “Cameras on or off?” “Do we use chat?” “When do I email vs. call vs. video call vs. chat?” “Do we use a communication tool like Slack or similar?” “Are there no-meeting days or other rules around scheduling meetings?”
  - \* As you can see, there is a lot of information to cover here! This is all about how you and your team work together, and how you expect them to work. By setting these expectations, your new hire will fit right into your team’s cadence from Day One and feel less like a newbie.



**6. Have them meet with the team — In Step 1, you set up a quick welcome to introduce your new hire to the team. Now help them get to know each team member better.**

- \* One of the biggest questions a new hire has is, “who do I work with, and what do they do?”
- \* Schedule time for them to meet with and get to know each team member. Have the team member share what they do within the company, their background, and anything else that may help them connect.
- \* These can be a small group or individual meetings. Prioritize meets with people they’ll work with the most, but be sure they’ve met everyone on the team by the end of Week Two.
- \* Assign them an “onboarding buddy” (a member of your team that they can go to with quick questions). Often a new hire needs to know “how things work around here,” and that information is better coming from a peer than their manager. Select wisely; your new hire’s buddy will influence their engagement and perception of your company.

**7. Have them meet with their manager — It’s assumed that your new hire met their manager during the interview process, but now they need to learn the rules of working together.**

- \* Whether they ask or not, your new hire needs to know, “what are my responsibilities—not just my job description?” “what are your expectations of me?” “How do you like to communicate?” “When, how, and how often will we meet?” “Do you want check-ins and updates?” “Do you prefer me to pop in with a question or schedule time?” “How should I report progress or review my work with you?” “How are decisions made or expenditures approved?” “What do you need to approve vs. me making the decision?”
- \* If you are not the new hire’s manager, schedule time ASAP, preferably Day One, for them to meet one-on-one.
- \* Obviously, there is a lot any new hire needs to know about working with their new manager. How well an employee and their manager work together has a substantial impact on long-term employment success. So make sure everyone is on the same page right from the start!

**Remember**—people often don’t quit companies; they quit managers. Setting expectations early on can help avoid many issues down the road.

**8. Get them trained — Regardless of experience level, every new hire will need some training to get up-to-speed and productive in their role.**

- \* Your new hire might have questions, but generally, it's your responsibility to identify the training they need. They don't know what they don't know.
- \* Determine how you will teach them what they need to know about the company. If there are scheduled trainings for all new employees, get them set up for the first available session or provide online links on their first day. Don't leave this up to the employee—they don't even know where or how to access this information yet, so make it easy for them to get started.
- \* In Step 3, you already provided a virtual tour of the equipment, systems, and software they'll be using.
- \* Have them complete basic training for all of your primary systems, focusing specifically on how you use that software or tool. Even if they have previous experience, it might be different than how they've used it in the past and will be a good refresher.
- \* Identify gaps and provide resources upfront. Don't wait for them to ask for help; people will struggle for way too long when they think they are supposed to know something already and don't.

**9. Get them started on a project — When someone starts a new job, they are eager to get going and want to feel accomplished.**

- \* Be prepared to answer questions about this first project like “what will I be working on?” “Who is it for?” “Who am I working with on it?” “When is it due?” “What's the approval process?”
- \* Make sure you have a project or two lined up for them when they start. It's OK to select something low-risk, with a more extended deadline, or have them partner with another team member on a current project.
- \* Depending on the role, they might work on their first projects alongside or by shadowing other team members.
- \* Schedule a good balance of training, meetings, and projects. You wouldn't want to watch training videos eight hours a day, and neither do they.

**People want to feel productive as quickly as possible**

If someone starts a new job without anything to work on, they can begin to wonder why they were hired!

**10. Ask for feedback — Throughout the onboarding process, ask for feedback and what questions they might have.**

- \* Confirm they are touching base with both their manager and onboarding buddy at least once a week.
- \* Schedule their 30-day, 60-day, and 90-day reviews to check in on progress and identify any areas of improvement. When you can catch an issue early on, it's much easier to resolve or correct.

**Don't Forget**

Critical touch points for any new hire are Day One, Week One, 30 days, and 90 days. At a minimum, you need to be checking in at each of these points to ensure things are going smoothly.

## MY REMOTE READY ONBOARDING CHECKLIST

- ✱ Confirm the new hire's start date and add it to the team's calendar.
- ✱ Schedule time on their first day for a team welcome.
- ✱ Confirm where exactly the new hire will be working; this could be from home, a shared co-work space, or one of your company's other office locations.
- ✱ Send a welcome kit with information and company-branded items.
- ✱ Identify all equipment required and have it sent to arrive before their first day.
- ✱ Create an onboarding schedule for their first two weeks. (Tip: If they'll be working a combination of some days remotely and some days in the office, set up virtual training for their remote days and meetings or other connection opportunities with team members for in-office days.)
- ✱ Provide all logins and technical support contact for any issues.
- ✱ Schedule an equipment and technology review.
- ✱ Set up a benefits and policies review.
- ✱ Schedule time to review team communication guidelines.
- ✱ Assign an "onboarding buddy." (Be sure to tell that buddy what you expect from them!)
- ✱ Schedule times to meet team members individually or in small groups.
- ✱ Schedule times to meet with their manager at least once a week for the first 90 days.
- ✱ Register them for company training sessions. (Don't skip this step for temporary or contract employees; it's just as vital for them to know all about the company as your full-time employees.)
- ✱ Plan out additional training sessions. (Tip: Avoid video burnout by breaking up online training sessions with meetings and project work throughout each day.)
- ✱ Identify the first project or two that they'll be working on or who they'll be shadowing.
- ✱ Determine when and how you'll get feedback throughout the onboarding process.
- ✱ Schedule their 30-day, 60-day, and 90-day touch base with their manager.
- ✱ Remind them to check in with their onboarding buddy at least once a week; this can be casual, maybe over lunch or a cup of coffee.
- ✱ Give your new hire a big enthusiastic **FIRST DAY WELCOME!**