— *White Paper* —

A Guide to Onboarding a New Remote Employee Virtually

INTRO

The world is becoming increasingly globalized, where hiring remote workers that you never bring in for an in-person interview is more and more common. Meeting face-to-face can be a challenge, especially during global events like the current COVID-19 pandemic.

Some new employees may work from home for the first weeks or months of their career, while others might be remote workers for as long as they work for you. It makes sense that onboarding them remotely fits right into their transition to employment with your company.
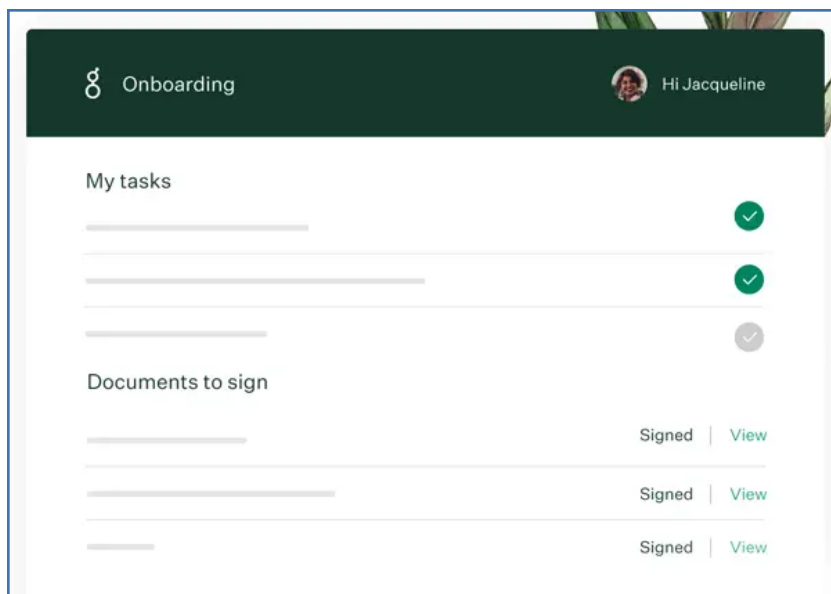
> Once you've picked a high-quality candidate and passed them through your interview process, you need to onboard them. Without the benefit of working with your hire in person, you'll want to supplement that missing element with regular communication and feedback, a proper introduction, and various tools for collaboration and document signing.

There's no reason you can't do this virtually, so long as you have the right tools and the right plan of action in place.

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Design (Or Adapt) an Onboarding Process

Unless your company is brand new or disorganized, you likely already have an onboarding process. Some or all of that process can be taken and adapted to a virtual environment, but sometimes certain elements are more difficult than others.

For example, taking a team out for a lunch to introduce a new member is more difficult when restaurants are closed and social distancing is in effect, or when the new hire lives in a different city.
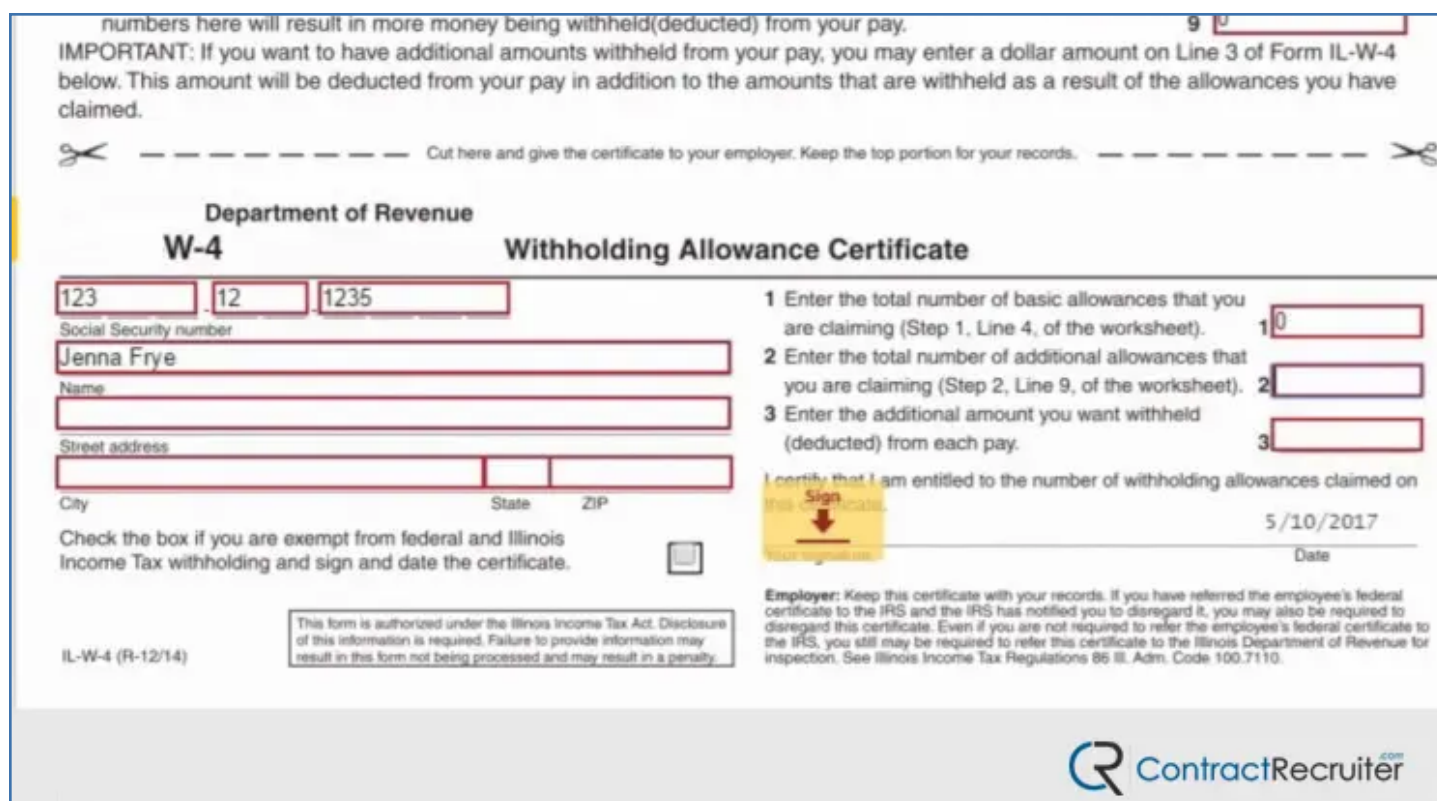
The first step to developing a new onboarding process is looking at your existing process and figuring out what works and what doesn't. Look for the elements of a strong onboarding process, like:

- Handling paperwork quickly but comprehensively.
- Providing a detailed schedule for the first day/week of employment.
- Providing access to important documents, such as employee handbooks.
- Putting the new hire in touch with their team members and direct superiors.
- Providing the employee with the technology and access needed to do their job.
- Giving them short and long-term goals for their employment.

Some of these elements will traditionally be handled in person in your current onboarding process. They will, by necessity, have to be done via digital means in a virtual onboarding process, whether it's through phone contact, Zoom meetings, or a company/department Slack channel. Your first goal is to identify which elements of your current process need to be changed, and which are fine the way you've always done it.

Prioritize the Necessary Paperwork

No employee wants to spend the first weeks at their job wondering if the paperwork they'll sign will ever properly be processed. Most companies, of course, have their affairs in order, but there are always some that are disorganized or behind enough that their paperwork takes forever to be issued, returned, processed, and filed.

With virtual onboarding, at least, paperwork is made a lot simpler. You can use digital files to deliver important documents like company policies, usage agreements, contract definitions, and your employee handbook. You can also use a service like DocuSign to get signatures on the important contracts and acknowledgments necessary to fully process a new hire.

Digital paperwork saves physical space in your HR department's filing cabinet, it saves time and postage that would otherwise be spent mailing paperwork to remote workers, and it allows easier archiving with redundant storage. Once you've made the transition, whether or not remote hires are the impetus, it'll be hard to go back.

Set Up the Right Technology

You need technology to support a remote worker one way or another. It might include the IT infrastructure to support remote intranet access. It might be the meeting software or chat software that facilitates departmental communication, like Skype, Teams, Zoom, or Slack. It might simply be access to your existing SaaS platforms.

A lot of this needs to be done before you even begin the recruiting process. Setting up infrastructure is something that requires the onboarding of your existing employees as well. Some of it is already in place, like SaaS access, of course. However, some of this infrastructure may involve implementing brand new technologies and software.

One thing you might consider is using this as an opportunity to improve and upgrade the technology your company uses across the board. There are a lot of innovative and powerful apps and platforms available for remote work and general business, and onboarding new remote workers can be a great opportunity to make the change.

![ContractRecruiter.com logo]

Make Sure the New Hire Has Their Resources

What does a new hire need to start their job? We're talking about technology, resources, access, and so on.

- Make sure they have any company-issued technology, from laptops to 2-factor authentication fobs to specialized software, ready and available to them by their start date. Nothing is worse than a first day where they can't do anything.

- Make sure they have a company account with access to email, intranet, and any apps or platforms they need to do their job.

- Make sure they have access or contact information for any messaging platforms you have in use.
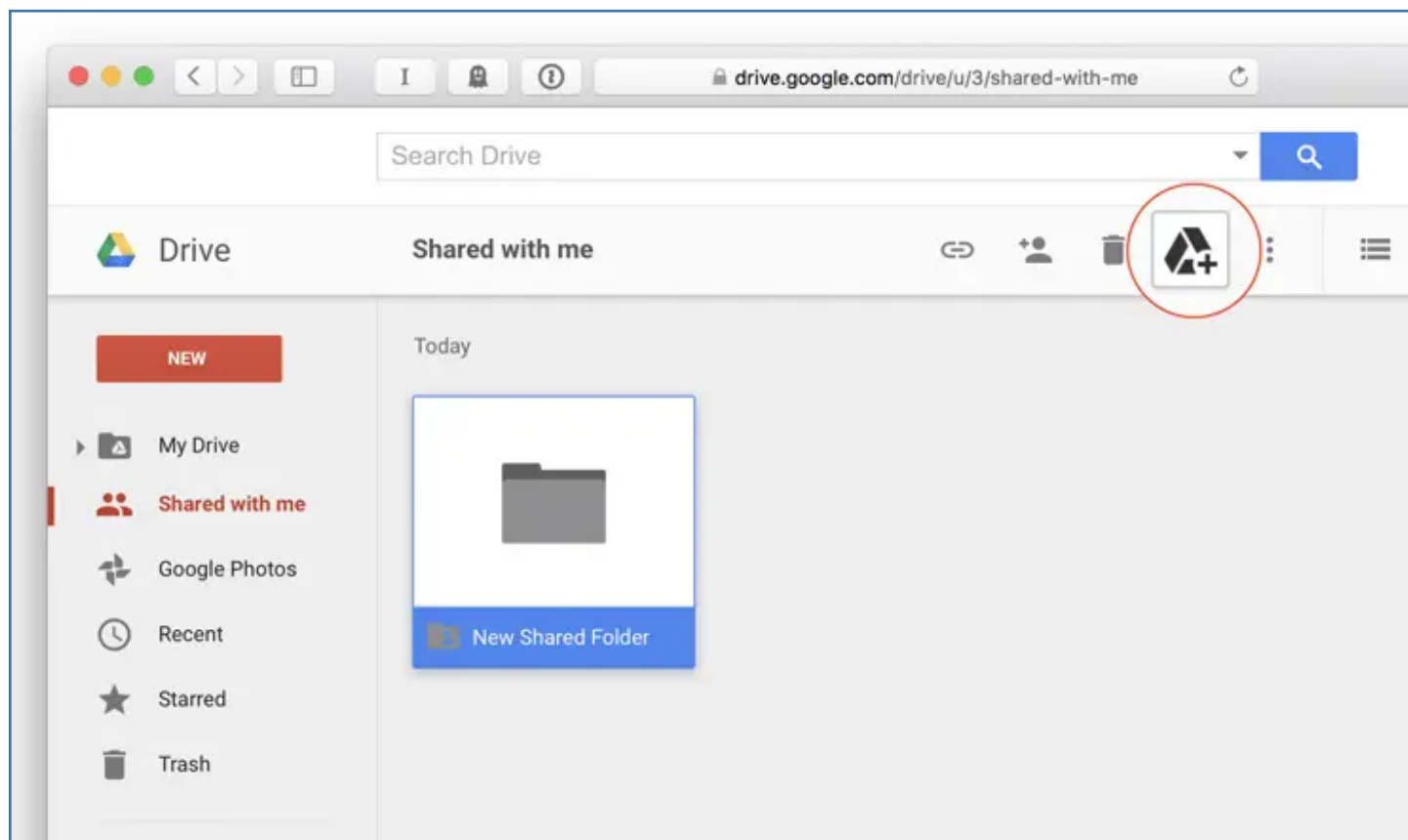
It also means knowing who in your HR, IT, and other departments is responsible for setting this up and making sure your new remote worker gets it, and who they can contact to troubleshoot any issues they may have with it.

Introduce the New Employee

Once your new employee is set up, schedule a meeting to introduce them to the team or the company. Smaller companies can pull an all-hands meeting to introduce the new hire, while larger companies may want to limit it to their department or the team they'll be working with.

There are a lot of ways you can go about this. You can:

- Schedule a lunch meeting, and let the new employee expense lunch so they have something tasty to take the edge off their nerves.
- Send out an all-hands email announcing and introducing the new employee, so people know what to expect when they meet.
- Host a video conference with some of the more traditional icebreakers or conversation starters

Some of the standard techniques, like a pre-stocked desk, company caricatures, or fun toys don't really work for a virtual employee, though you can certainly send them something goofy and fun to show off on the virtual meeting.

This is a huge point where you showcase your company culture and make your new hire feel at home. Dave Ulrich, from the RBL Group, says that priority number one should be to help the employee "Understand the firm's culture – the norms, values, and unwritten rules that create the firm's identity in the marketplace." Use this introduction as both a way to introduce the new hire to your team, but also introduce your company's culture to your new hire.

Assign a Company Mentor

One of the more common recommendations for employee onboarding is assigning a "buddy" or a mentor for your new hire. This person is someone who is given the task of introducing the new hire to their coworkers and managers, showing them the ropes, helping them when they have questions, and generally being the first point of contact for any issues that may arise.

(Image credit: Acceleration Partners)

This is a little harder to do in a virtual environment since it's harder for the buddy to drop in and ask how things are going, and contact through anything but a Slack channel often feels more "official" and thus harder to approach. Still, assigning someone to be the point of contact is a good idea.

> Your buddy for your new hire should ideally be someone who has gone through a similar or the same onboarding process, who is friendly and outgoing, who has effective digital communication skills, and who has both the knowledge and the connections to get your new hire whatever help they need. It doesn't need to be their manager, but a senior coworker is often a good choice.

One good option is to assign a buddy your new hire can shadow to see what kind of tasks they'll be doing in action. Shadowing on the job is traditionally done in person, but modern meeting tech like Zoom can use screen sharing to simulate the over-the-shoulder style of job shadowing. That's what Acceleration Partners does in its 100% remote company.

Set Defined Points of Contact, Meetings, and Expectations

Don't leave it up to your assigned mentor checking in on the new hire; make sure they have structure and a defined set of check-ins to meet. Throughout the first weeks of their job, you should make time to check in on them in both an official and an unofficial capacity. Officially, check in with them to see how they're settling in, oversee their tasks, address any issues, and guide them towards their role. Unofficially, talk to them about how they're settling in, how they're engaging with their buddy, how the company culture is working for them, and other more personal, less tangible experiences.

Flexibility is key. Christie Ramsaran, an engineer at Shutterstock, emphasizes that :

> "There was no deadline for my training – it was tailor-made to suit my needs."

The first few months of a new hire should also include plenty of structure with meetings, defined tasks, and deliverables. This allows you to judge how they're adapting to their role and how they're performing with their assigned tasks. Be careful to judge both the employee's performance and your onboarding process; a failure to meet expectations might mean those expectations need adjusting, more than anything else.

Be Open to Feedback

During your onboarding process, ask questions of your new hire, their assigned mentor, their manager, and anyone else involved in the onboarding process. Ask them questions about how smoothly everything is going, and solicit ideas about improving the process.
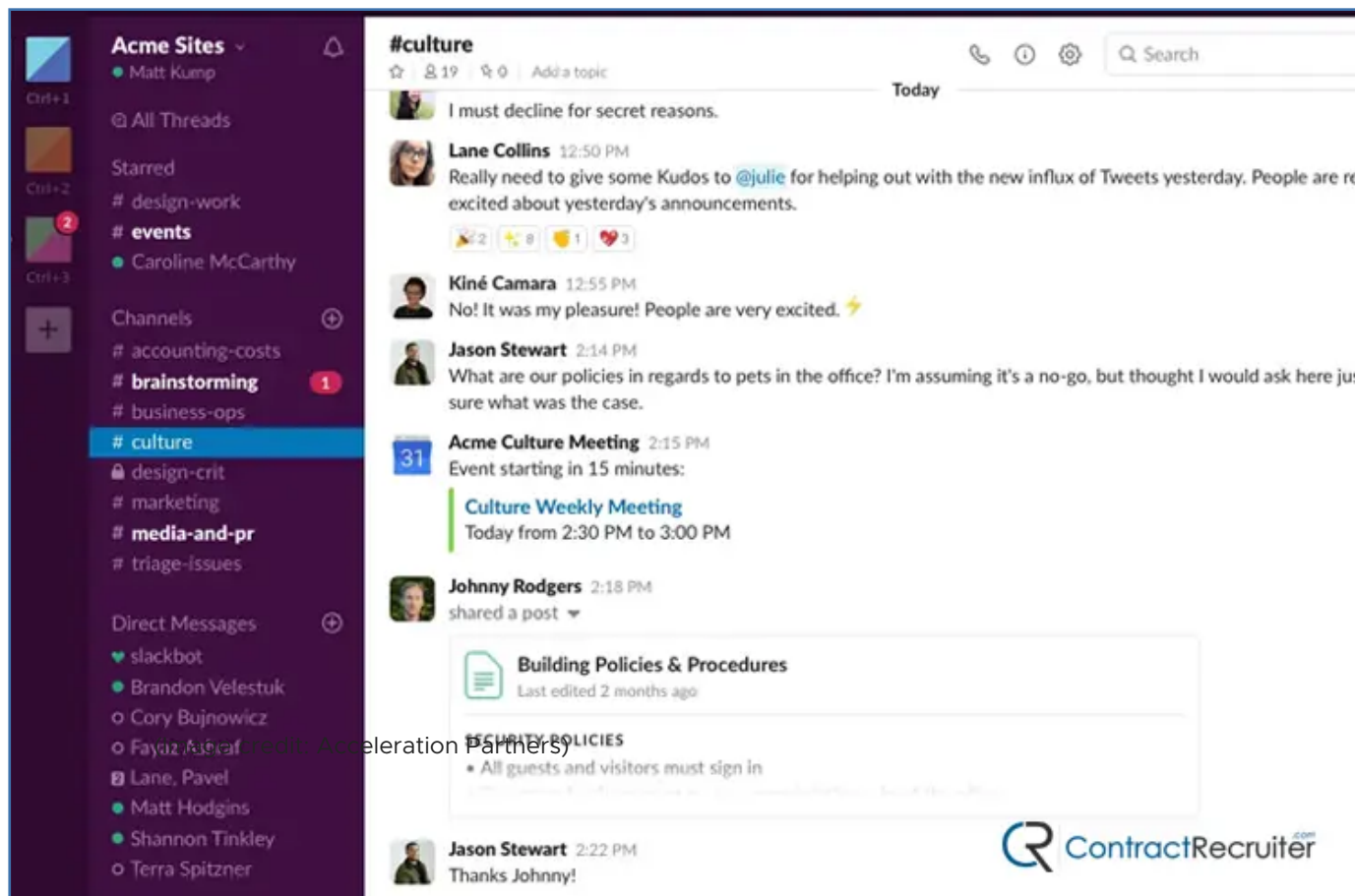
Maybe your IT department needs more warning to set up hardware and software access for a new employee. Maybe your mentor could use specific training or more defined connections with managers and other points of contact. Maybe your initial onboarding process could stand to be a little more organized. Maybe your all-hands meetings turned out awkward and could use structure and guidance to be effective.

You're not going to get it right the first time. You might never reach a point where everything is "perfect", because perfect doesn't exist. Onboarding will always be a matter of adapting your process to a new hire's role, temperament, and skills. You need to be open to the feedback to make those adjustments.

Create a New Hire Resource Guide

As you progress through the onboarding process, you'll find that some questions come up. Some are personal and unique to the individual hire, but many will be about things like company culture, expectations, guidance on specific tasks, and so on. For these more general pieces of knowledge, it can be useful to create a company knowledge base with instructions, clarifications, and advice. You can put this together organically and refine it with each new hire until it becomes a valuable onboarding tool in its own right.

As Sarah Wetzel, of engage:BDR, says:

> "Each new employee brings with them [the] potential to achieve and to succeed. To lose the energy of a new hire through poor onboarding is an opportunity lost."

Every new hire is a challenge and a unique opportunity, and virtual onboarding is a unique new challenge for many businesses. It may require a lot of introspection and adjustments to your existing processes, but it's an effort that will be well spent.