

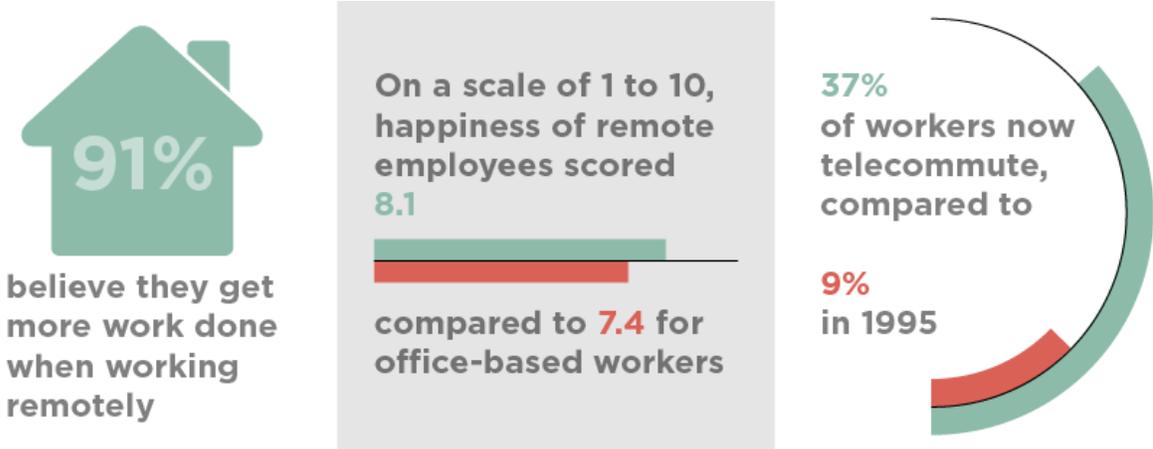


SUCCESSFUL EMPLOYEE REMOTE ONBOARDING CHECKLIST

As any of us who've joined a new business or have recruited new staff will know first-hand, the process of onboarding can make – or break – those crucial first few days, weeks and months.

With many employees making the decision to stay with a company long-term within the first 6 months, and employee turnover costs and impact high on the management agenda, it's an area seeing increasing investment.

At the same time, the benefits of remote working – including flexible working opportunities and reduced stress from commuting for employees, and cost savings, increased productivity and globalization opportunities for employers – have seen organizations re-designing and re-shaping themselves, adjusting for this new style of working.



However, when it comes to delivering effective and tailored onboarding practices for our *remote* workers, we're still behind the curve.

This is a demographic of employee with unique challenges, needs and requirements. Simply replicating the traditional steps of in-office onboarding with 'adjustments' for that lack of physical contact won't work. It's time for a new approach to onboarding remote employees.

ONBOARDING CHECKLIST FOR REMOTE EMPLOYEES

Each organization is unique in its practices, culture and requirements of new employees, so an effective onboarding checklist will need tailoring to your organization. This onboarding checklist template is easy for you to adapt to your own needs, while some may need to explore the unique needs of workers based outside your office space.

Got an existing onboarding program? Given the unique challenges facing remote employees, it's best to approach the process as a 're-design' rather than a 're-purposing', if you have an existing checklist for in-house employees. While some steps overlap, there are some extra things to consider.

STEP #1: BEFORE THE EMPLOYMENT OFFER

The process of onboarding actually begins with the *recruitment* process, particularly when it comes to remote workers.

Remote workers – and employers – often face challenges around accountability and management of workloads. Reports show employers struggle with visibility of what their remote workers are doing; and remote employees are more likely to overwork as a result. It pays to be transparent about this process from the get-go.

Set out clear expectations of the role, hours of work, any perimeters around routine and how you would expect to be updated or monitor output. Ensure interviewees are aware what objectives would be set and the protocols for reporting against those. This ensures there is no conflict or misinterpretation once they start.

If your remote employee is not interviewing in-house, their visibility of your employer brand and culture will be limited to what they see online, and

their experiences during the recruitment process. Take time to think of the actions you can take to include them as much as possible. This include communicating tools such as slack, video conferencing products such as Zoom or GoToMeeting. You must also put forward your corporate values, the go-to colleague or manager when they have a question or an issue, update careers information on your website, set out clear communications and channels and provide feedback when interviewing.

“Employers need transparency, authenticity and creativity to win the audience’s attention and interest online”
Potentialpark.com

74% According to Potentialpark, 74% of job seekers use companies’ career websites as their most important source of information online.

 Unbridledtalent.com reported that a whopping 65% of companies use social media to communicate their employer brand...

 ...And 78% of companies communicate their employer brand via their career sites!

In a survey performed by Careerbuilder.com, 67% of Job seekers said they’d accept a lower salary if the company had exceptionally positive reviews online.

“If you have a brand message that needs to carry across multiple channels, you want to be consistent and portray all of your company brand’s features consistently across all media”

Leslie Cope, Senior Product Director at Monster.com

Bernard Hodes Group reported that Employer Brand ROI expectations for employers include an increase in applicant quality by a staggering 89% and increase employee engagement by 61%!

Don't underestimate the value on online employer branding, particularly when recruiting remote-based employees who may not have any first-hand experiences of your business. (Source: 'Employer branding statistics you need to know', SoftGarden)

By being clear about who you are, you're also more likely to attract candidates who align with your company culture – increasing the chance of a good fit, and retention rates.

Checkpoints for the recruitment stage:

- Set the communication channels and frequencies
 - Update role description and responsibilities
- Be clear on goals and targets
 - Careers information current and update
- Interviewee given details around role expectations and accountability

STEP #2: ON ACCEPTANCE OF OFFER

Regardless of where employees are based, there is always some paperwork.

While standard onboarding practices are typically the same for remote workers, sending out paper-based documents may cause some additional headaches. For this reason, consider using a certified virtual signing system, such as DocuSign, which is legally binding.

What's more, if your workers are based internationally there may be different documents required for proof of eligibility to work, alongside differences in tax or payroll. Take the time to consult with employment or legal experts from

each territory, to ensure you're compliant and have all the necessary paperwork to be completed.

Checkpoints for the offer stage:

- Verbal offer
- Formal written offering
- Agree starting date
- Issue job contract, with copies for employer and employee
- Send copy of full job description and role responsibilities if required
- Request for new starter information with Contact information, Social security, payroll details, tax and work eligibility forms, ID and references if required
- Confidentiality Agreement & Non-disclosure Agreement

There may be additional documentation surrounding registrations and laws specific to your business.

STEP #3 BEFORE THE FIRST DAY: PRE-BOARDING

You're looking to get buy-in, engagement and motivation from your new employee from the outset. Don't wait until their first day; take this opportunity to begin introducing them to your business and its culture, as well as performing vital admin tasks to ensure those first few days go as smoothly as possible.

Pre-boarding is rising in popularity, particularly as statistics report that **33 percent of employees knew whether they would stay with their company**

long term after their first week. Pre-boarding can also boost speed, confidence and competence, helping your staff to get ahead.

Here are some key requirements:

Send a **welcome email** to your new starter a week or two before commencing their role. In this, you should:

Set out the **Onboarding journey** for the first few days and weeks. This gives the employee some mental preparation for what to expect once commencing employment. **They will need to know about their training.**

Provide **details for a point of contact** in HR or management, in case the new starter has any initial questions.

Send your **company handbook** or provide early access to your employee intranet, to give insight into your business culture, vision, and values. Your company handbook should include clear specifics about your methods and processes. Simple processes such as using Outlook calendar to book meetings may be obvious but must be mentioned.

Provide **access to FAQs** to answer common queries around who to contact, when employees will receive their equipment, common benefits and so forth.

Set them up on the **various communication channels**, being Slack, Zoom, Skype. Consider a platform like “Workplace” from Facebook or your Employee Engagement Platforms if you have one.

Send a **‘Welcome to the team’ pack**. It’s a small gesture, but it will help get your employee excited about the role. A care package of company branded goodies such as pens, a notebook or a mug is a good starting point.

Here, Twitter's branded 'swag bag' of goodies shows the creativity possibilities to make an employee feel part of the team – regardless of where they're located. (Source: Quartz) & Uber's full-on swags. (Source: Wispapp)



Order necessary equipment or tools required, such as Laptop/PC and Mobile phone

Set up their necessary accounts for key IT systems. This includes:

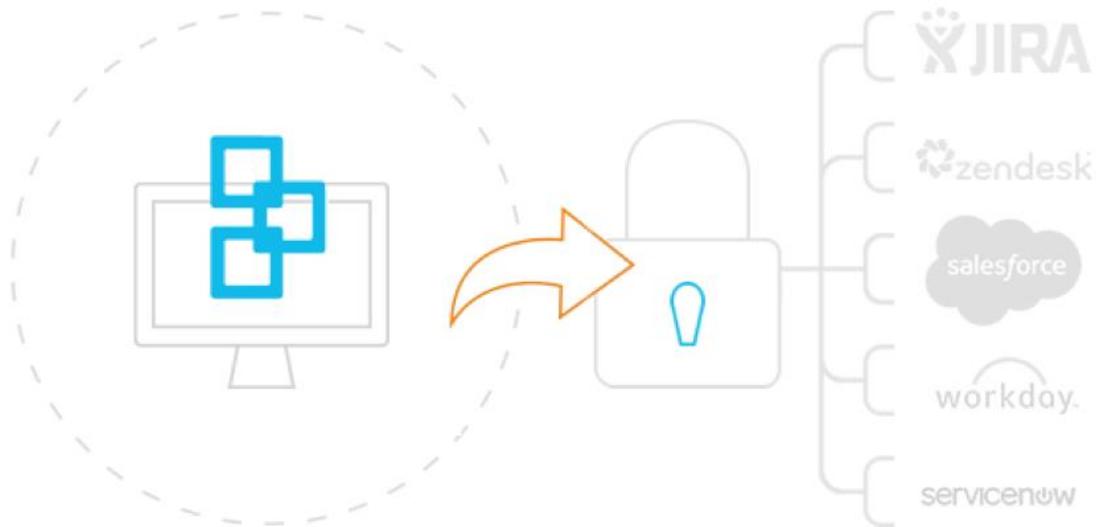
- Company email
- CRM
- Cloud storage systems
- Windows/Office 365
- HR, Training and Payroll systems
- Employee Engagement platform
- Slack, Zoom, GoToMeeting and any other tools you use

- Project platforms such as Trello or Asana
- Other applications your company uses

If equipment is coming from you before going to the employee, download and install necessary applications ahead of the day. If equipment is going directly to the employee, create step-by-step instructions, or ideally, set up a virtual induction meeting with a member of your IT team to go through this process. Services such as 'LogMeIn' or "TeamViewer" allow your internal teams to remotely gain access and place essential tools, applications and necessary permissions on the employee's hardware.

Consider what additional tools or applications a remote worker may need, that you don't currently use for in-house staff. Mobile app versions of particular tools may be key for workers who are out of the office.

To ease the burden of remembering multiple logins and passwords, consider password synchronization or set-up tools such as "LastPass"



Discuss with the new recruit their **individual requirements** and ability to meet demands of role description. This may include:

- **Determining their Wifi needs.** Do they have sufficient connection reliability and speed to perform their role? Will they require VPN access to ensure a secure connection to certain applications or business data? From that, identify the security needs they may require.
- Do they have a **dedicated workspace** at home or will they be hot-desking, looking for a flexible shared office, or simply going to a nearby coffee shop? Identify if they need support finding and setting up an appropriate workspace, and any equipment requirements – an additional monitor, for example, or a suitable desk, filing system or a webcam.
- What **role-specific tools, platforms and systems** do they need access to? Ensure necessary accounts, permissions and applications are arranged ahead of time, for ease of onboarding.

Finally, **book and add induction & training sessions to diaries** for those charged with delivering these to your new starter – more on these sessions in the next section.

STEP #4 THE FIRST DAY

In any given role or business, the first day can often be an overwhelming experience.

For the remote employee, **this sensation is amplified.** Without face-to-face engagement or the ‘physical’ aspect of onboarding that office employees benefit from, remote employees are subject to information overload: wrestling with realms of documents or virtual meetings. This can be disorientating.

The key to success on day one is to be mindful of this, and strive to balance out the day. If you’re able to bring your employee in-house for the first day or week of employment, great. If that’s not a possibility, adapt with the following ideas.

- **Office tour:** regardless of whether your employee will work in or even visit your headquarters or office, your physical space still offers an insight into your culture and personality as an organization. It is also a source of intrigue for any newbie.

If you can bring them into the office, give your remote employee a virtual tour. You easily walk around with a smartphone on a Skype/Whatsapp/Zoom video call or pre-record something. Give them an idea of layout, where people sit and where key processes within your business occur. This brings your organization to life for them. Even better if you get key Team members to say “hi” on camera.

Not sure, how to do this? We have the resources to build a great professional Employer video for you, for a small cost!

Alternatively, you can start with a free one here: <https://biteable.com>

Here is an example: <https://youtu.be/1pNdw3oJNv0>

(This great tour of Cube’s Edelman office not only gives a visual insight into the work environment, but some great indications of the overall culture and ethos of the business.)

More sample videos here: <https://biteable.com/blog/tips/employee-onboarding-orientation-videos/>

- **Ensure essential systems, accounts and communications platforms** have been set-up if not already done, with IT support – for example getting email and Office accounts up and running, providing complete access to cloud storage and intranet platforms, or setting up an instant messaging / Skype account. This time should also be used to give a top-level overview of security best practices for IT and systems.
- **Introduce them to their team:** whether there are team members working within the office or based remotely elsewhere, strive to set up a video call team meeting to introduce everyone. Get each individual to give an overview of what they do, and how they’ll be working with your new starter.

- Provide your new starter with an **organization chart** and talk through the key members of management, alongside any reporting structures and direct reports. Give them guidance on who to go to for specific issues.
- Give your new starter a **dedicated sponsor or mentor**. No matter how comprehensive your company intranet or onboarding process is, they're still likely to have questions; they may also simply need an informal sounding board to check in with during the early days or weeks of employment.

Arrange a **one-on-one meeting with manager or supervisor** to set out initial tasks, discuss the role in more detail and set out expectations and responsibilities.



(Ensure you've covered all your bases. Onboarding mishaps set a negative precedent and damage the way your new worker perceives the business. Source: Robert Half)

STEP #5 THE FIRST WEEK(S)

The key theme to this first week getting your new recruit immersed in who you are, what you do, and what you stand for.

This is where we see the distinction made between orientating – that is, giving someone the ‘nuts and bolts’ to get ready for doing their job – and *onboarding*, which is a more comprehensive process, designed to give your new hire a solid understanding of their role and place within your business. For remote workers, this process is typically a matter of onboarding to the digital workplace.

YOUR ACTION PLAN

During this period, you need to make a **careful plan of action**, especially at the start, for the first 2 weeks:

Deliver good induction sessions with key department representatives to give your new employee an introduction to the business, its mission and values, its major offering (your product or service) and key differentiators, alongside administrative inductions to cover need-to-know business information. You need to engage them on your company values and get them to really understand your business and your goals.

Do this face to face if you can, or virtually, using an online video meeting software. Don't underestimate the value of “face-to-face” delivery at this stage, particularly for this type of employee. Where possible, use video conferencing where you can share your screen, to give your new starter the opportunity to ‘meet’ key figures in the organization.

Why Do We Need Video Conferencing Anyway?

1. Distributed teamwork is the new norm



of people work on distributed teams.



people work on 3-5 teams at a time.



think their tools don't support distributed teamwork.¹

2. Global mobile worker population is nearly 40% of the workforce



40%



2015: 1.3 billion
2010: 1 billion
2009: 850 million
2004: 650 million²

3. 60%-90% of communication is nonverbal (depending on the situation)⁴



4. Multitasking kills meeting productivity



of people admitted to multitasking during meetings (survey).⁵



People said they are least likely to multitask on video calls vs. phone calls, web conferences and even in-person meetings.⁵

(Investing in video conferencing tools and processes is key to facilitating remote working, from onboarding and beyond. This ensure remote workers are engaged and involved, at every stage. Source: Fuze)

Plan what you need to do and what you want to achieve, but you may need to book sessions with:

- **Management** – to offer an initial overview of your organization, exploring its history and story, its key achievements and milestones, the company mission, vision and values, its objectives and growth plans, an introduction to the organizational structure or hierarchy, including a 'who's who?' of key figures within the company
- **HR** – covering elements from your company's handbook, such as the company benefits package, absence policy, equal opportunities or discrimination

policies, grievance and disciplinary procedures, health and safety or performance management.

- **Finance** – detailing payroll protocol, submitting of expenses or finance-based benefits, such as health care or pension
- **IT** – vital for remote workers who expose themselves to potentially higher levels of risk on public networks, this session may cover information and data security, acceptable use policy, permitted software list, password policy and basic security practices, such as use of anti-virus software, safe email usage and where employees can store business information.
- **Product / Services Expert:** Pick your most reliable expert to offer an overview of your product or service, its purpose or objectives, USPs and any future plans or developments, as this will be a great way to engage and showcase the strength and values of some of your team members
- **Marketing:** Providing an overview of the key differentiators of your business, its brand, competitors and market, your target audience or persona and the key messaging of your business

In some organizations, the logistics of orchestrating inductions with each different department can be a challenge. It may be worthwhile considering a series of videos or presentations as a back-up option. Ensure that throughout, you're introducing your worker to any organizational lingo – acronyms, shorthand, nicknames or terminology – that you have.

Don't stop teaching. Onboarding is a process, not an event: if there is a way to immerse your remote worker in your product or service, such as giving them your product to road test, this can be invaluable.

GOALS AND TARGETS SETTING

This is a crucial part of their remote onboarding, as without this, you will fail to ensure their commitment through structured management.

Set out success metrics, deliverables and key projects for completion during the first few weeks. Ensure you talk through the duties and particulars of the role in detail. Defined goals and clear guidance on how these will be assessed give your new starter focus and direction, while providing a benchmark to review performance at the end of the probationary period.

Plan daily or weekly goals

Plan weekly check-in meetings with both line manager / supervisor, and HR or senior management. Conclude these with a **formal regular review** to assess performance to date, obtain feedback from your new starter, identify any challenges and set out future steps for the role and that individual's development.

Video meetings to ensure constant communication and feedback

Plan the training. The first few weeks will give them the opportunity to complete a full training about your organisation. You need to make sure you keep them busy with information on your company, products, methods, processes. This is the time for them to learn everything about your business. Check regularly on their training requirements and ensure these are addressed. For example, if your new starter needs additional support with processes or tools specific to your organization. Remember that these individuals will find it more difficult to learn a few months later, especially without the face-to-face interactions we benefit from in the office.

Training is a very important part of their integration

Ongoing tasks you track, are a key to keep them engaged. During the initial integration period, it is the opportunity for them to focus on learning as much as possible about their job and your company. Make sure you have weekly tasks for them to achieve with deadlines. They need to feel that you are there for them and that the first few weeks are valuable. Set them goals to learn about your products, your competitors, your methods, your tools.

Make a full list of tasks and deadlines

THE VALUE OF ONBOARDING

It's something we've seen time and time again, and if you manage employees well during that process, you will benefit immensely through your employee engagement. You should involve a line manager, or you HR professional and they should be explaining the significant benefits of effective onboarding. However, it's worthwhile revisiting those benefits.

Rolled out successfully, an onboarding program will:

- **Reduce time to productivity** for new employees
- Boost **employee engagement and commitment** to your business
- Increase **employee retention**, and deliver associated **cost savings**
- Significantly boost **employee happiness** and **reduce work-based stress**
- Improve **job performance** and enhance best practices such as **collaborative working, innovation, and team work**
- Create **Brand Ambassadors**, improve the overall **employee experience** and impact **employer brand**, and ability to attract and retain future talent.

Amongst the stats surrounding effective employee onboarding, we know that they can increase employee performance by up to 11 percent, increase discretionary effort by more than 30 percent and that employees are 58 percent more likely to be at the company three years later if they complete a structured onboarding process. Those are figures worth noticing.

Create your successful Onboarding now!

For more information on how Technology is used for Better Recruitment, contact us.

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