how to onboard new employees while working remotely.

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Starting a new job is a hopeful, exciting time. In a typical workplace, managers meet their new employees with a hearty welcome, a round of introductions and an orientation to prepare them for their new role. In many workplaces, that tradition has evolved. More of us are working remotely, particularly lately as a response to the COVID-19 pandemic.

Managers who have never onboarded an employee remotely are often unsure where to start. What tools and resources do you need? How can you make sure new employees feel supported when they're working on their own? Onboarding new employees while working remotely requires a unique approach. We've put together a guide to help you start your relationship with new employees on the right foot when you can't onboard them in person.

create a digital onboarding package.

Set everyone up for success by making sure new employees are well-prepared to dive in on their first day of work. Connect with HR to create a digital onboarding package and provide it to new hires several days before their start date so they have a chance to absorb all the material.

Things to include:

- Documents, forms and information they need to sign, i.e. offer, digital copies of their ID, non-compete, benefits forms, etc.
- Employee handbook, data privacy policy, help desk information
- Access to tools, software and their email account

If you're providing hardware, such as a laptop or phone, take care to have it shipped well in advance so they have everything they need from day one. It's also a good idea to set up a virtual or phone meeting with HR the week before their start date to give them a chance to ask any questions about the onboarding package.

build a training plan and schedule.

Most employees are more confident and perform better when they feel prepared and know what to expect. It's helpful to create a training plan that they can begin on day one.

Best practices include:

- planning and scheduling training sessions.
  Identify the people who will be training the new hire and put a schedule in place starting their first week.

- creating meeting invites in their calendars.
  A pre-populated calendar with all the right information at their fingertips can help them feel purposeful right away.

- making sure trainers are briefed.
  If various people will be training a new hire, be sure they know what they will be teaching and that they have their materials ready.

- preparing training documents and cheat sheets.
  Include key information that the new employee can refer to as they begin to work on their own.

- splitting training sessions over multiple days.
  Too much information at once is overwhelming.

- using a secure video conferencing program.
  Make sure the software allows the trainer to share their screen, draw on a virtual white board, if necessary. It should also provide two-way communication.

start with a face-to-face interaction.

It's hard to feel like you've officially started a job if you don't cross a new threshold and immediately begin putting faces to names. Managers can recreate this experience for new hires by scheduling a face-to-face meeting via a video conferencing platform first thing on their first day.

It's a good idea to start with a 1:1 video meeting with their direct manager to welcome them and explain the training and onboarding plan. Follow up with a video meeting with the team, so they can meet their colleagues in a relaxed way before getting down to business. You might even take the time to share a little about each other so meaningful connections are made.

use tools to streamline training.

Amp up your training efficiency by preparing pre-recorded videos for some of the more straightforward processes or skills most new employees need to learn. This gives the new hire a breather from the intensity of 1:1 video conference or phone training by allowing them to take it at their own pace and pause when necessary. Be sure to connect with the new employee afterwards to see if they have questions.

Although pre-recorded videos save time, it's important to avoid making them the only way you train employees. While recordings are convenient, they can also be seen as isolating and impersonal. It's best to find a good balance between video training with interactive, video conferencing training.

prepare activities that reinforce learning.

Sometimes new employees need a transition between "learning" and "doing", particularly if they work remotely and don't have the benefit of seeing others do a similar job. To help make learning stick, create exercises that involve skills and processes they've learned in training.

It's important to clearly outline your expectations and objectives for the tasks and to make sure colleagues are available to provide support and answer questions. Depending on the complexity of the exercises, you may even assign someone to work with them via video conferencing for the first few tasks.

try group training or a buddy system.

Are you hiring a team of remote workers at one time? You can create a sense of camaraderie by conducting group training or pairing employees to learn together. Small group training via video conference allows people to learn more deeply by sharing observations and discussing what's being learned.

Another way to make sure new hires feel welcome and supported is to connect each of them with an experienced colleague who can act as a point of reference and check in with them from time to time. Seeing a task being completed via screen sharing makes it easier for a new employee to operate a new system. It also helps them to get to know their colleagues and build rapport among the team.

communicate often.

When it comes to onboarding remotely, there's no such thing as over-communicating. As helpful as phone calls, emails, video conferences and in-app communications are, they can't take the place of a face-to-face conversation and body language.

If you want remote workers to feel welcome and part of the team, it's important to show it—and often. This might mean:

- asking managers and colleagues to go out of their way to be friendly, helpful and supportive

- setting up regular team and 1:1 video chats

- inviting new employees to reach out with questions and new ideas

- providing a list of contacts available to answer questions

- checking in often
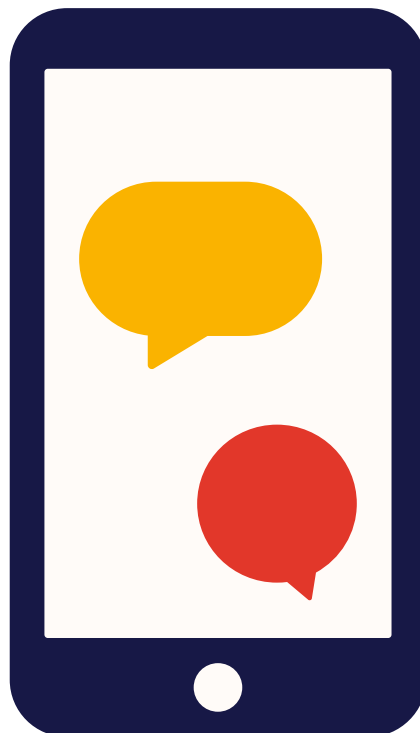
make team building and employee engagement a priority.

Nurturing a cohesive team and ensuring employees are plugged into the organization requires a new way of managing. In the absence of spontaneous water cooler chats among colleagues, it's important to create the conditions for working relationships to develop and prosper.

Regular video conferencing meetings shouldn't end when a new hire has been successfully integrated into your team. Encourage team members to set up weekly meetings to discuss projects, but also connect on a personal level. You might organize virtual social gatherings, clubs and learning opportunities where employees can discuss things that matter to them that are unrelated to their professional roles.

Special attention needs to be focused on helping employees feel connected to the values and goals of the organization. Regular email newsletters, social networking channels, videos and even short podcasts can form the basis for remote staff to feel involved in the bigger picture.

ask for feedback and evolve.

It's natural to refine your remote onboarding process over time. The best way to ensure you're hitting all the right notes is to ask for feedback from employees who have gone through your onboarding program. Be honest with them about your learning curve and ask them to be candid with their responses so you can improve the process for future hires.

Most importantly, be prepared to act on what you learn quickly. Set up your remote onboarding processes to constantly evolve. Using file sharing programs like Google Docs make it easy to be nimble in changing, adding or removing portions of your training documents.

Need help developing your remote onboarding process? Our HR consulting team can offer the support you need to create a custom remote onboarding process that works for your team.

onboarding new employees while working remotely.

pre-planning

finalize the offer

- collect key documents and signed forms
    - final signed job offer
    - digital copies of ID
    - payroll enrollment
    - confidentiality or non-compete agreements
- agree on a start date and time

gather information and documents

- create a digital onboarding package
    - employee handbook
    - data privacy policy
    - key contact numbers
    - HR and benefits information
- set up access and logins for your company email, software and intranet

ship hardware such as a laptop, monitor or phone

build a training plan

- create a training calendar for trainers and new employees
- plan content of training sessions with trainers
- prepare training presentations, documents and cheat sheets
- pre-record training videos for straight-forward tasks

the first day

welcome the new employee

- greet the new employee at the start of their first shift via video meeting

- explain the training plan and answer any questions

- schedule a team meeting to put faces to names

prepare activities to reinforce learning

- assign tasks that use skills and processes new employees learned

- ensure colleagues are available to answer questions

- consider setting up group work via video conference

- pair new employees with experienced colleagues for support

ongoing engagement

stay in touch

- use phone, email, chat and video meetings to keep in touch

- set up regular team and 1:1 video chats to check in with new employees

- provide a list of contacts new employees can reach out to with questions

- set up weekly meetings to discuss projects

- organize virtual social gatherings for employees to get to know one another

ask for feedback and evolve

- prepare feedback forms or set up a post-onboarding interview

- encourage new employees to share their ideas and feedback

- act on what you learn quickly and make changes

- use file sharing tools like Google Docs to stay nimble and quickly adapt your training documents based on feedback

Need help developing your remote onboarding process? Our team can provide support with developing a custom remote onboarding process that works for your organization.
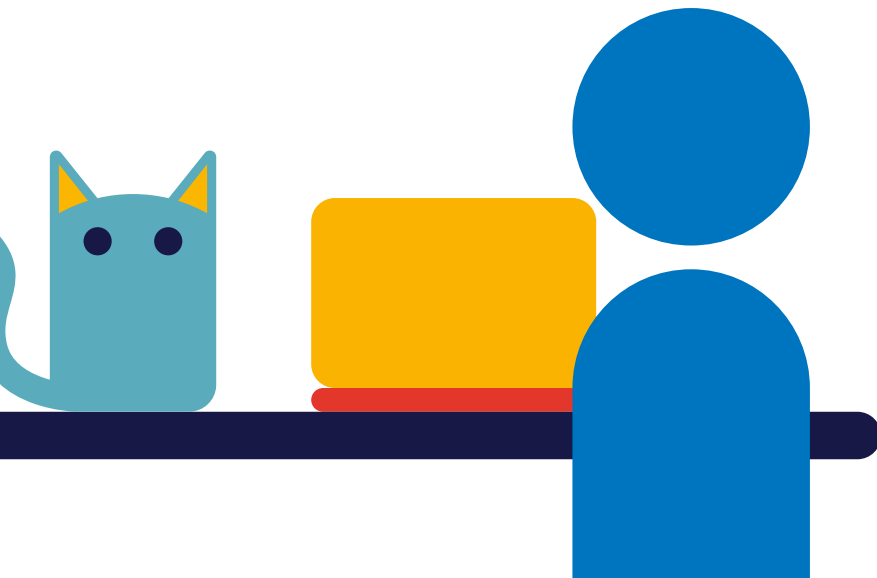
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