Virtual Onboarding Checklist for Remote Employees

If you've hired some new team members, you can take care of their
onboarding process virtually as long as you have the right plan of action, coordination, and tools.

Use our checklist to virtually onboard new employees and set them up for success

In this stage of the COVID-19 outbreak, it is still unclear how long the encouraged "work from home" will last. For some businesses, this will mean pressing pause on onboarding new employees. For businesses that have business critical hires or that are growing during this time, the show will have to go on. This means that some new employees will be onboarded into the company virtually.

Onboarding new employees virtually is something companies can do with the right amount of planning, coordination, and proper tools. If you're considering taking your onboarding process virtual over the next few months, here are a few areas to consider as you map out your new employees welcome into the organisation.

Creating a new process

Before you commit to onboarding new employees, meet with all departments involved in the onboarding process and come up with a realistic plan of action. Items you'll have to agree upon include:

Communication with the new hire

- There will inevitably be changes with the required communication with the new employee. You'll have to decide who will be responsible for sharing information with them regarding their first day. This information should include:
- Links to join into any video conference taking place
- A clear agenda of what they should expect for their first few days
- What device they should be using. They may need to connect through their personal device as you help them set up their work device
- What time their onboarding sessions will begin and end
- How they can prepare (ensure they have a strong Wi-Fi connection, a quiet space to work, functioning camera, etc.)

This may be the first time the new hire is working remotely, so be as explicit and instructional as possible.

Hardware setup and delivery

Since this new hire won't be in the office on their first day, you'll have to ship their laptops to their home and plan for the following:

- Who will be responsible for shipping their hardware?

- You'll have to configure some systems for the new employee before shipping it. With this in mind, how long will it take to set up the hardware and ship it out? Before promising any start dates, you'll have to take this time into consideration.
- How much of the new hire's laptop setup and profile logins can you complete before shipping out the hardware? Setting up systems over video conferences can be a painful experience for the new employee. The more you can do in advance, the better!
- How will you share passwords and login credentials safely?

Modifying your content for virtual learning

If you already have an onboarding process in place, you'll want to modify your content to be accessible for virtual workers. Some pieces of content you'll want to rework include:

Welcome information folders

If you typically hand new hires a welcome package or folder full of useful documents, these will now have to be amalgamated, organised into a PDF style document, and sent out digitally.

Onboarding presentations

If you typically do an in-person presentation introducing the company, you'll have to modify that to suit virtual learning environments. For example, if you usually stream a YouTube video in class, remember that video won't stream properly over screen sharing and thus won't be a good experience for the learner. Make sure to include visual aids on your screen if you're explaining anything out loud so the employee can follow along.

Instructional eLearning

If you typically have the learner sit with someone to review tools and systems, consider replacing that with short eLearning instructional videos.

Planning their first week

If your new hire is starting virtually, you'll have to work with your managers to hyper-plan their first 5 days as they won't have colleagues around to point them in the right direction. Consider scheduling the following events over video conference:

- Individual introductions to each of their teammates
- Team virtual lunch
- Introduction to leaders in their team/cross-functional teams
- Introductions to support teams
- Assigning them 2-3 tasks they can complete over their first week
- Team meeting to discuss the team culture and expectations
- Set up a buddy system with a more experienced team member for extra support

YOU'LL WANT TO MAKE SURE THAT NEW EMPLOYEES ARE NOT SITTING AT HOME ALONE WONDERING HOW THEY ARE GOING TO FILL THEIR FIRST FEW WEEKS OF WORK.

Important topics

It may take a little longer to carry out a full induction remotely. The important topics to cover are:

- New starter information
- Introductions to the team
- Company mission, vision and values – ideally a session from a senior manager
- Understanding how the company is structured
- Employee handbook review and key policies
- Training plan
- What is expected of the employee such as a job description, working hours etc
- How you will keep in touch
- Who the employee can contact with any concerns?
- Who will support them through the first couple of weeks?

As you deliver any content or presentations to new employees over video conference, do check in every minute or two to make sure they are still engaged and participating.

Working from home can feel isolating at the best of times, so it is important that employers stay in touch to check on employee wellbeing as well.

The onboarding process will set the tone for the employee's experience with the company, so it pays to invest in making it a great one!