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Onboarding Guide

HR Checklist for Remote Onboarding



Onboarding Guide

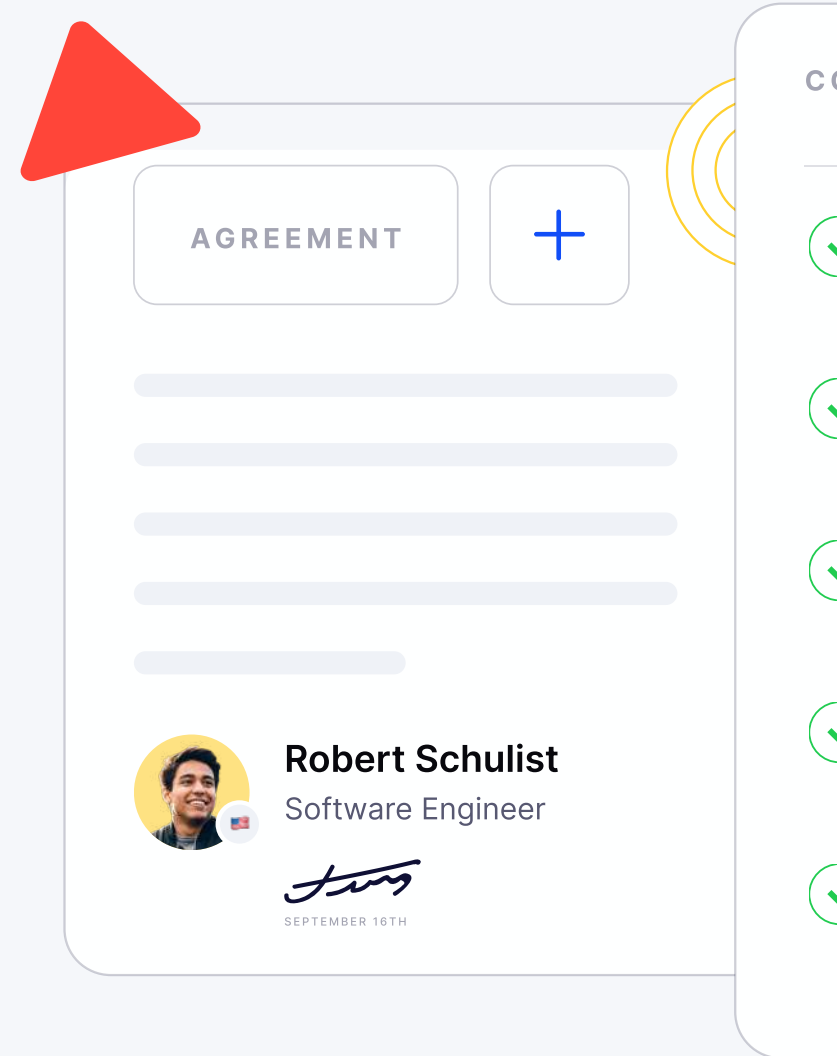
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Onboarding is a critical first step in establishing a strong and trusting relationship with your new hire. It's about setting them up for success by ensuring they have the information and tools they need, that they feel comfortable enough to ask questions, and that they know what to expect in their first few weeks. With remote hires, onboarding is even more critical to ensure it's done right.

New hires that work 100% remotely aren't able to benefit from the in-person connections that non-remote workplaces are able to provide from day one. While remote working definitely has many benefits, it also creates different challenges when it comes to onboarding your new employees.

How well, or how poorly, you onboard your new hire can make or break how quickly a new employee 'ramps up' in their position and whether or not they stick around; in fact, some studies have shown that almost 30% of new hires quit within their first 90 days. Considering the effort and resources spent during the hiring process, ensuring a stellar onboarding experience for your remote team is more critical than ever.

In this guide, you'll find some key steps to help you successfully onboarding your remote team members that will enable them to ramp up quickly (and thoroughly), feel connected to their teammates and the organization, and truly set them up for success in the long term.




Create a memorable first impression!


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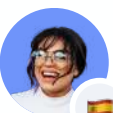
First impressions last well beyond that initial moment when you first meet a new hire who, at this juncture, is somewhere in your pool of candidates for an open position. Just as you remember your first impression of any business you've interacted with, so will your new hire. Putting your best foot forward starts here. Building positive momentum from the first interaction will set the stage for a powerful, engaging, and robust onboarding experience that aims to keep your new hire challenged and happy about their new role.




How do you make a memorable first impression?

 **Manuela Kuhn**
Switzerland

 **Dimitri Fischer**
Germany

 **Arlene Barrows**
Spain



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First

First, make sure they have all the information they need before the interview. Let them know what the steps in the process are, who they'll be interviewing with, if the interview is by phone, video, or some other medium, and any other particulars that help them prepare. In the remote world, we are often connecting virtually on Zoom, MS Teams, or other similar platforms, and ensuring your candidate is comfortable with your meeting platform is important; you don't want them left struggling to connect on the day of the interview.

To help your potential new remote hire feel connected right from the first impression, provide them with the interview information through a video call rather than email. This is a unique option that helps candidates feel more comfortable and confident, having met a member of the team before the actual interview and sorted out any technological kinks before the real event.

A quick 10 minute video call is all that is needed. You can use this time to:

- Provide information on the overall recruitment process — The steps, who is involved at each stage, and overall timeline.
- Specifics for the first interview — Expected duration, type of interview questions, and if they will be expected to demonstrate any particular knowledge or skills during the call.
- Help the candidate download any software or other set-up requirements for the interview; if they will need to share screens, ensure they are aware of that and are able to do so easily.
- Provide contact information and what-to-do instructions if they are unable to connect at the time of the interview.
- Answer any questions the candidate may have.

Second

In the actual interview, recognize that the benefits of body language no longer exist. Humans are relational individuals who react to social queues, which sometimes cannot be seen when meeting virtually. Communication is key, and you can't communicate enough during an interview.

Consider simple things such as:

- Explaining how you'll be taking notes — the candidate may not be able to see or understand that you're writing things down — or that you are even taking notes — and misinterpret your activity for inattention.
- Highlighting where you are working from and if there may be any form of distraction. While we all try to keep our remote workplaces as professional as possible, life sometimes has other ideas despite our best efforts. If you have pets or kids, or sense there may be some background distraction, communicate this to the candidate ahead of time. It can actually help make the interviewee more comfortable and able to relate.
- How you can communicate without saying anything: if the company values would normally be posted in the hallways of a traditional company, consider how you can post them virtually through your video background.
- Asking the candidate what would help them feel most comfortable — do they worry if it's okay to have a sip of water during the interview? Is it okay to mute their microphone if they need to? Candidates may have thoughts that you haven't even considered.
- Keeping the interview as 'active' as possible. Keep the conversation two-way; encourage the candidate to feel comfortable and share their story. Encourage them to interview you!





Run on schedule. Many hiring managers are rescheduling interviews due to work demands and virtual meetings that are running back to back. This sends the message that there are more important things than the candidate. Respect their time just as you'd expect them to respect yours.

Third

Running on schedule can also apply to responding when you say you will in terms of emails and follow up, and not leaving candidates wondering what's happening on your end. Remember in this virtual world, you can't communicate enough with someone you have never met before. It takes a little more effort to establish a rapport but is so worth the effort.

Lastly, end the process in such a way that the candidate is excited about your company and the opportunity, even if they didn't get the job.

For example:

- Reiterate the interview steps and expected timelines, in particular when they should expect to hear back from you.
- Thank them sincerely for their interest. They could spend their time anywhere and they chose to spend it with you, learning about the company.
- Answer any questions in a fulsome, not cursory, way.
- Send a thank you email post interview, reiterating your thanks for the time they spent with you and when they can expect to hear something.

They will remember their interactions with you and others, and hopefully speak positively about their experience. If they are offered the job, they will be even more excited about joining.

Pre-boarding

Everything following the final interview can be considered 'pre-boarding' for the chosen incumbent, and is an important phase in keeping the candidate excited about joining and reducing the chance of a no-show on their first day — because it can happen. If a candidate is expecting an offer to come through and doesn't hear anything for days, they often just move on.

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The importance of communication never changes in a remote environment, and HR or the hiring manager should be keeping in touch with the candidate right from the final interview through to their first day. It is important to keep the connection with the candidate flourishing and to maintain their excitement to join your team. Here's what you should be doing during the pre-boarding phase:





Get the job offer out in a timely manner.

HR or the hiring manager should call the candidate to verbally present the job offer and review the benefits available to the candidate. This personal touch will ensure the employee feels like they are in good hands, and give them an opportunity to ask any questions they may have about the offer. Companies who wait days to send out an offer risk losing the candidate. And nothing says disorganization like a delayed offer (or worse, one vastly different than what they were expecting).



Update the internal team about the new hire.

Make the appropriate internal announcements and let IT know what systems they will need access to and by when. Invite them early to Slack or your MS Teams chat, and make them feel welcome even before their first day.



Send some love!

Company swag is a great way to say 'welcome to the team' and strengthen the relationship at its outset.



Follow up on them

Have HR ask them for some feedback on their experience during the hiring process, and if they identify any gaps, follow up on them. Being transparent about wanting to create the ultimate candidate experience and asking for their input will show you value their opinion.



Get some of the necessary paperwork done ahead of time.

Set up a time to call or have a video chat to review the new hire package which will include things like; tax & benefit forms, and other basic information can be completed ahead of time. This process can be a little daunting for a new hire, so spending time with them will ensure they feel supported. This also helps create 'stickiness' of the employee to the organization. If the employee isn't responding to requests to have paperwork completed, they are a potential flight risk. Knowing this ahead of time provides an opportunity to address any concerns the new hire may have before they step in the door.



Set up the first meetings

Book some calendar invites for their first week — to meet colleagues, to join meetings, and to check in with HR and the hiring manager. Make sure you communicate with the new hire, give them a heads up of the meeting invites that will be coming, who they will be meeting with, as well as the purpose of the meeting. This would be a good time to send an organizational chart so your new hire can start to visualize the different areas of the organization and who the key players are. Allow some time in these meetings for your team and your new hire to share some personal information, anecdotes, stories etc. It is important to manifest that "water-cooler chit-chat" using your remote work tools. You can provide some "get-to-know-you" in the onboarding documents. This will help to build office relationships, and ensure the onboarding process is fun and personal.



Set up expectations

Have their manager personally reach out to provide information about what to expect on their first day, where they should 'be' and when on their first day, and to answer any questions they may have. For example, let them know you'll be online at 8:30 am and will meet with them first thing.



Set up the first meetings

This is a key time to talk about how the team works remotely, how they connect, and the common company 'locations' where team members hang out. For example, if you use Slack, what channels do you have that they should ensure they join? Do you have any company club channels, like a foodie group or a travel-share channel where they can get to know their colleagues more personally?



Provide work Equipment

It's also important to discuss the type of equipment and software that will be provided to the new hire to perform their role. You can also let them know when they can expect to receive any equipment and how it will be arriving, and let them know that you'll be there first thing on their first day to help them get logged in and set up.

Onboarding

Onboarding starts on the new hires' official first day of work, with the goal of helping them settle in and become acquainted with the company and their new team members. Remote teams are challenged by a lack of visibility — new hires cannot 'see' everyone busily working in their offices, or walk around exploring when they aren't sure where to explore.

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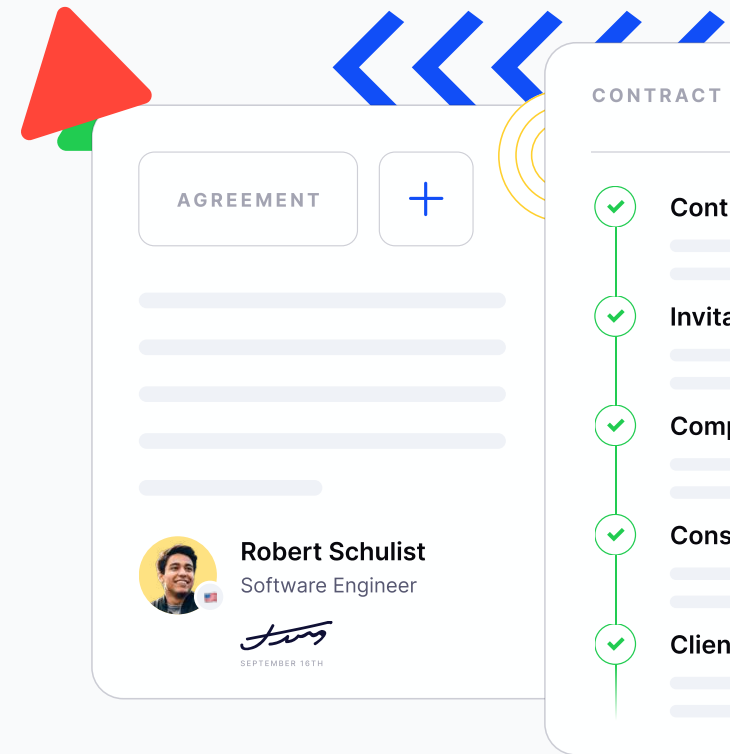
This is also the time when the employee will begin to experience first hand everything you've been telling them about, and it's your job to make sure that expectation meets reality. One of the top five reasons new hires quit in the first couple of weeks is because they find the work/ company different from what they expected.

One of the key ways remote companies can help ensure onboarding success is by assigning a buddy to the new team member - someone they can virtually follow around, ask questions, and lean on when they need to without feeling like they are interrupting. Buddies are a great way to help the new hire feel comfortable and welcome, and can be a good starting point for further internal networking.

The buddy can help them understand norms and general expectations in the workplace, and where to find information in their virtual work environment.

When you consider onboarding, consider everything that needs to be accomplished in the first three months of their employment, and what 'success' looks like at the end of those three months. This is the crucial period where suitability, from both sides, is considered and it's important to provide the resources, tools, and support your newest addition needs in order to be successful.

The onboarding period can actually be broken down into phases that address different expectations during their first three months: learning, applying, and optimizing.



Learning about the company and its remote working norms:

The learning period (roughly the first month) is about just that — learning about the company and their role in it, the expectations of their manager and team, the company structure, its vision and mission, and its policies and procedures.

Have their full name, picture, and title on their remote profile;

If you haven't sent the org chart during their pre-boarding, send it now.

Set expectations around online status (online, on a call, out of office, on vacation, out sick, on lunch).

Set rules of engagement to increase productivity and let the new hire know if it is acceptable to block focus time in their calendar or if they are required to be available during their entire shift.

Set the expectation of response time (email or Slack or Teams messaged), for example does their role require a response right away or are they in a position where an immediate response is not required.

Review the company's handbook and policies with the employee, answer questions and ensure understanding. This is particularly important when it comes to remote teams and understanding how they work with each other, with their systems, and with their customers.

Highlight who their contacts are, and where to find them in the virtual office.

Walk them through any platforms they may be required to use, such as internal websites and learning platforms. Show them how to use the tools and provide them access to any training they may need to complete right away.

Ensure they have access to, and know where to find, important information about your organization's values, vision, services and products.

In the first week, regular check-ins should be set up with the hiring manager and, separately, with HR, and communicating frequently — multiple times during the first week, both formally in meetings and informally by DM, should be the norm.

Remote employees should not feel ‘unseen’, and communicating and connecting regularly helps strengthen the relationship in its early days. Even if there is no formal topic, checking in to say hello and ask how things are going is an easy task.

The applying period is roughly the second month and is focused on helping the individual apply their skills and experience in a productive way. They should be feeling comfortable with where to go for information and how to access remote resources.

The optimizing period is when the new remote hire is able to leverage their knowledge and skills in their position and is excelling in their new role.

Learning about their team:

In the first week, arrange a ‘welcome to the team’ virtual lunch. Spring for home delivery, and use the time to get to know your newest team member and for them to get to know the team and bond with their colleagues. Breaking bread and sharing a meal is a great way to stimulate casual conversation and reduce “new hire” jitters.

Learning about their role:

Review the incumbent’s job description, and establish expectations.

Make sure the new hire is a part of channels / groups that are required for them to do their role. Review with them the purpose of the channels/groups so they know where to go for certain topics.

Assign them things to do right away, including teamwork projects. This will help alleviate feeling isolated and unsure as to what they should be doing and help promote connecting with others.

Develop a learning plan for the first 30/60/90 days and noting milestones and/or deliverables on a weekly basis. By setting up a clear roadmap for the new hire, you are enabling their success alongside helping identify any performance or training gaps early on, particularly during the first couple of weeks.

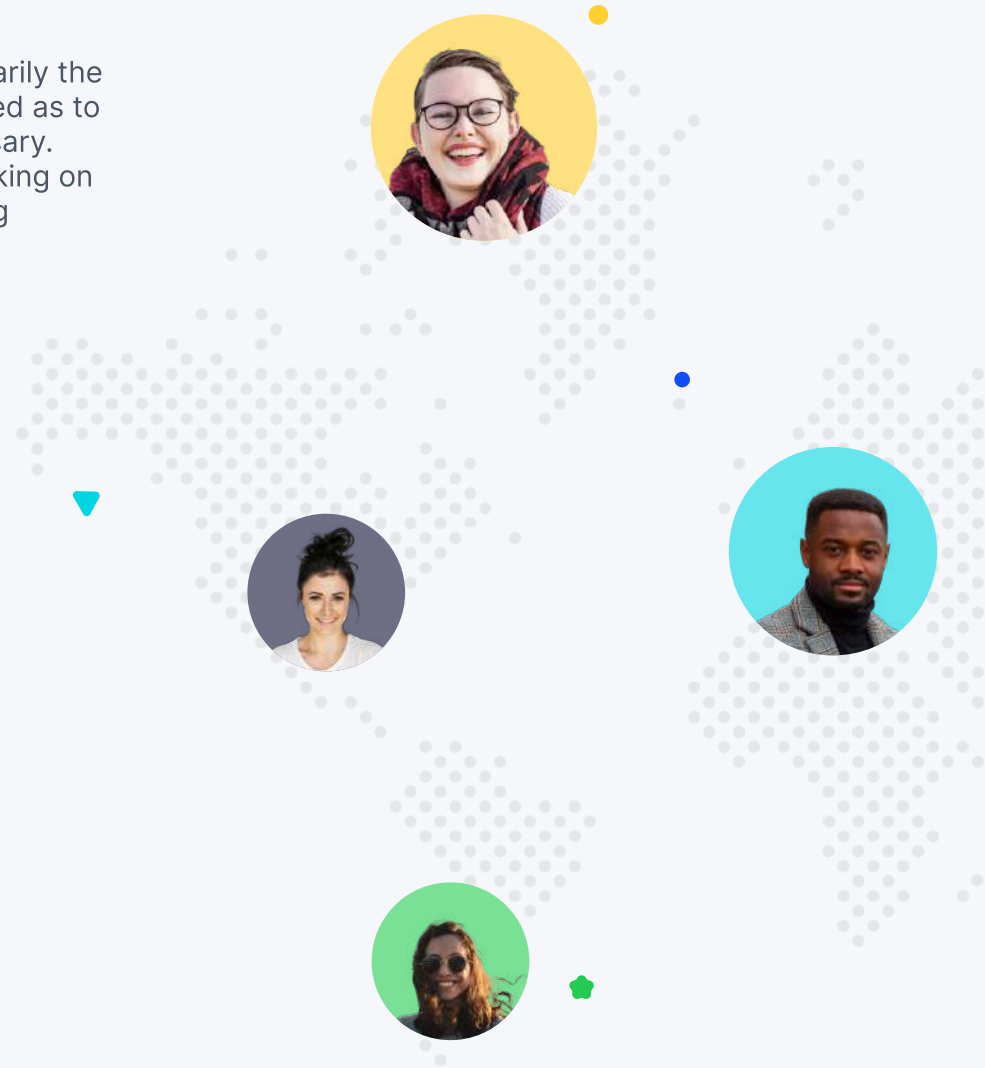
Engagement

Keeping new hires excited and engaged about joining your company isn't hard, but it requires action in order to keep them involved and enthusiastic. Engagement is primarily the responsibility of the individual's manager and is done by keeping the new hire updated as to what they need to be doing, what their priorities are, and supporting them as necessary. They are responsible for making that connection between what the employee is working on and how it ties to the organization's goals, and they are also responsible for providing regular coaching and feedback while leaving room for employee independence.

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Work relationships are often shaped through the casual and informal discussion that take place in the office through “water-cooler” conversations, during natural breaks such as the morning coffee break, or lunch. Through a little bit of effort, employers can create that informal atmosphere in the remote workplace. Considering an ice breaker activity for a new employee. Create a questionnaire that will lead to discussion around personal topics such as family or hobbies. Create a time for new employees to connect with their team members to share weekend plans. This can create room for follow-up, and break through the barriers of formality that can sometimes be felt in the remote workplace.

Employees are engaged when they have clarity around their responsibilities, the resources they need to do their job well, and the opportunity to do great work everyday. Communicating these to your new hire regularly will go a long way to keeping them engaged.



Culture

Culture is a result of behaviors and norms in the workplace, and during the pre-boarding and onboarding process it is important to talk openly about what expected behaviors are. When someone hears about a company's values but sees something different when they get in the door, the gap between expectations and reality can cause them to doubt their choice of your company as their new employer.

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Consider companies that say they are collaborative, transparent, and open. This translates to behaviours that emulate those values and what you would expect to see would be team members who help each other out, share information, give honest feedback, and work together to accomplish goals. When companies don't embody their values in the day-to-day, they are not building a positive culture and ultimately eroding trust. Companies need to walk the talk, and they also need to help their new hires understand what 'the walk' is. Correcting missteps in the first few weeks is a great way to reinforce that values matter. When it comes to remote workplaces, it takes effort to make

behaviours more visible than it would in an office environment. For example, how do you let team members know that you're available? In an office setting, keeping your door open is literally a visible sign that you're free; online, companies need to think about how their behaviours translate into the virtual world. Many collaboration platforms have option settings around availability that can be attached to an individual calendar, and will note when someone is in a meeting or when they are free. During onboarding, letting the new employee know when they are expected online or what the video protocol for meetings is (video enabled always?) is essential.



New Hire Retention

We've talked about some of the necessities during the onboarding process in order to keep your new hire from fleeing in the first few weeks, but there are other aspects that are equally important during this initial phase.

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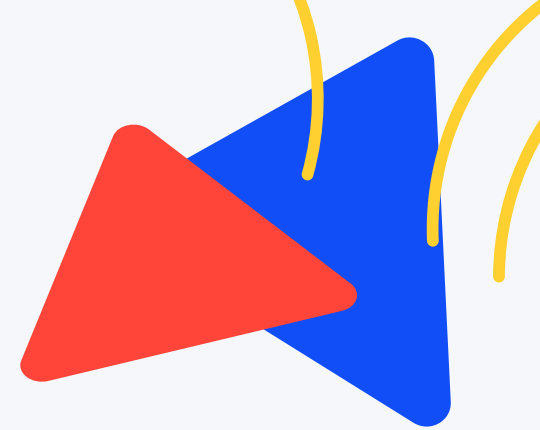
Helping new hires understand their Total Rewards package is one of the most important. Often new hires only see their salary and don't fully recognize the value they are receiving through other benefits and perks.

Communicating these during the pre-boarding and onboarding phases helps them understand there is value in staying with the company because they receive so much more than just a salary.

Ensuring your new hire isn't feeling overwhelmed or overworked is also key. Help them prioritize their work, and support them in terms of maintaining a good work-life balance. Talk to them about career paths within the organization, and what they can expect if they stay with the company longer term.

Today's employees are not 'lifers' but they will stay for a few years if the opportunity to learn and grow their skills (and salary) exists.

On a side note, conducting 'stay surveys' with existing employees is a great way to identify what you might be missing in this area. We've shared a lot of information in this document about pre-boarding and onboarding a new employee in a remote world. The key takeaway would be that "communication is critical" Starting a new role with a new company can be very stressful, especially when you don't have face to face interactions with your new team, you and your team can help reduce or eliminate that stress by keeping in touch with your new employee and making sure they feel connected to the team and the vision and goals of the organization. As mentioned before, this process can be more time consuming but in the end, if you make the time, you will reap the benefits of an engaged and happy new hire.



On a side note, conducting 'stay surveys' with existing employees is a great way to identify what you might be missing in this area.

Technology



Technology is a key tool in the remote-first toolbox and there are hundreds of applications out there that will help automate tasks, keep you organized and on top of an individual's onboarding activities, and provide a hub of resources and information for your new employee. Think of a spot that would be your company wiki, or knowledge base.

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HRIS systems, or Human Resource Information Systems, are where your employee records are kept. At their core, they track all key employee information such as personal data, history of compensation, various positions held, and are a place to store employee records relating to their hire and performance. They also provide options for automating hiring and onboarding tasks, and can create checklists and send out reminders to team members when new-hire activities need to be done. Systems like BambooHR can be used to help automate many administrative tasks related to onboarding.

Other software, such as Notion or Trello, are great places to store company-related information and guided onboarding for new hires. They can provide a collaborative space for the new hire to access all the information they might need, along with any attachments, task lists, and more. You can upload videos, assignments, or other reading for the new-hire to complete.

Slack also has some workflow automations that you can enable and use for onboarding that act as a bit of a self-guide for the new hire. The workflows can be set up so that when one task is complete, Slack will message them with their next task. Remember, too, to limit access to what your new hire needs. This

will help them avoid becoming overwhelmed with notifications, or confused about what channel or platform they should be on for a specific purpose. Keep things simple in the beginning — focus them on the structure of the systems set up, allow them limited access based on needs, and go from there.

Software is a must have but it doesn't replace the need for human connection. Frequent communication directly with your new hire through messaging, video calls, and group meetings is essential to keep your newest team member on track with their onboarding, provide them opportunities to ask questions or seek help, and demonstrates that you value them as part of the team.

Onboarding checklist



Pre-start date

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- HR to send the offer letter; ensure it's signed and returned by the stated date.
- Manager to send welcome email that includes information regarding their start date, time, and location.
- HR to provide new hire with contact information for their manager and others.
- Manager / HR to send company-wide email announcing the new hire, their start date, role, etc.
- HR to help new hire complete any new hire paperwork; obtain copies of new hire ID for benefits, etc.
- Manager to reach out and speak with new hire to let them know about what to expect on their first day, and to answer any questions.
- IT to provide systems access and order any necessary equipment; ensure company email is set up.
- Provide any documentation that is appropriate for the new hire to review prior to starting.
- Manager to send invites for all relevant team meetings for the first week (intros to team members, invites to group stand ups, one-on-one's with key stakeholders, etc).
- Manager to assign a buddy and introduce the two.
- HR to send swag to the new hire.



Day One

- Manager to greet the new hire and introduce them to the team, review activities for the day.
- Manager to ensure new hire can log into all systems they should be able to access.
- Manager or other to provide training on company software / systems.
- HR to review handbook and policies/ procedures.
- Manager to review job description, scope of role, and deliverables.
- HR to check in with the new hire at the end of day.



First Week

- HR to check that they know where to find information, resources, etc.
- Continue with any job-specific training.
- Manager to develop a 30/60/90 plan.
- HR to ensure employees documents have been completed and filed.
- HR to survey new hire for feedback regarding pre-boarding experience.
- End of first week: HR to inquire with new hire about how they are adjusting, liking their position, comfort level, etc



Remainder of First Three Months

- Manager to review 30/60/90 plan with the new hire each week in the first month, then as needed going forward.
- HR to check in with the new hire every couple of weeks for a pulse check: how are they doing, are there any issues or concerns.



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