



Onboarding Remotely 101

Introducing New Employees to Your Workforce Virtually

During the COVID-19 pandemic, many companies are faced with a new hurdle: how can they successfully continue to onboard new employees during a remote phase of work? This resource was put together to help organizations navigate the changes facing their companies, and to achieve success when onboarding employees remotely.

In times of remote work, communication and face-to-face interaction is more important than ever. When it comes to onboarding new employees, it is essential that companies try to replicate their normal procedures as closely as possible. Within this guide, you will find tips and suggestions from our experts and from other organizations on their approaches to introducing new employees to their workspace. From legal guidelines to training to team integration and Human Resources processes, we hope our Onboarding Remotely 101 guide is beneficial to you and to your organization.

Remote Onboarding:

A Timeline of Events

Below is a timeline of the elements we will cover in our Onboarding Remotely 101 guide. Use this visual as a guide to start planning for onboarding your remote employees before their first day.



Remote Onboarding:

Legal Documents

- 03** Legal Documents *Disclaimer: We've linked to a number of resources below to help you onboard employees virtually. Please be sure to reference these links, as we are not attorneys.*
- 04** HR Onboarding [Following Protocol](#)
The outbreak of COVID-19 has forced Management and Human Resources Professionals into a position that presents many challenges. It can be difficult to know which best practices to follow in a scenario that is entirely new. By following the guidelines below, you can ensure your organization is able to adapt while still following appropriate HR processes.
- 05** Team Onboarding [Best Practices](#)
Hold regular meetings with your leadership and Human Resources teams to determine which best practices need to be altered during a period of remote work. It is likely that things will pivot to accommodate the emerging challenges facing your organization.
- 06** Training
- 07** Additional Resources [Back It Up](#)
Be sure to adequately document everything. In a period where lots of changes are occurring in the workplace, it is crucial to maintain proper documentation practices. Should issues arise, you will then have the resources to justify your actions and back up your decisions.
- [I-9 Documentation](#)
Legal requirements still need to be upheld, even if the new employee is remote:
- Have the employee fill out their [I-9, Employment Eligibility Verification Form](#) on their first day
 - For more details, see [USCIS's Instructions for Form I-9](#)
 - For an updated account of the U.S. Department of Homeland Security's I-9 requirements due to COVID-19, [see this article from SHRM](#)
 - We recommend using an app to scan and send the documents if you are working with physical copies
 - Have the employee send a photo of the front and back of their identification documents to the employer
 - Have the employee complete necessary tax forms – work with your IT department to ensure they are accessible to accept a digital signature

Remote Onboarding:

HR Onboarding

- 03 Legal Documents [Documents](#)
If possible, ask new employees to complete initial Human Resources paperwork (Offer Letters, Benefits, Non-Compete Agreements, Work From Home Agreements) when they return their acceptance letter. This could minimize delays and will be less to worry about on their first day.
- 04 Onboarding
- Send all necessary tax forms to the remote employee
 - Send any necessary technology to the remote employee one week in advance, as well as the necessary agreement forms related to the equipment
- 05 Team Onboarding
- Be sure to discuss expectations, such as work hours and company dress code policies beforehand, to avoid issues on their first day of remote work
- 06 Training [Welcome Kit](#)
Consider sending new hires a welcome kit prior to their first day of remote work. This kit could be sent with any culture promotional materials (see here for our [Guide to Working From Home](#)), company swag and necessary technology equipment and instructions (for an example, see our [Sample Technology Setup Guide](#)) Additionally, materials such as pens, post its, notepads, an organizational chart, or weekly schedule can go a long way in making them feel welcome. Employees will remember their remote onboarding experience and are more likely to recommend a company who clearly went out of their way to make them feel welcome.
- 07 Additional Resources

[Kickoff Video Call](#)

Set up a video call with the new hire to walk them through their first day prior to their start. Discuss start time, schedule and any other pertinent details, including technologies and software they'll be using.

[Cultural Onboarding](#)

Any cultural norms that the company follows should be addressed with the new employee as soon as possible to allow them to fully participate and get involved. Be sure to give the remote employee a platform to introduce themselves to the team or to the company – whether it be at a virtual company-wide meeting or in an email. This will allow them to feel part of the community and will encourage others outside of their team to reach out to introduce themselves.

If your typical practice is to introduce new hires to the leadership team – follow through with that promise virtually! Set-up opportunities for them to meet in a video call and connect face-to-face. HR professionals could also schedule 1:1 casual lunches or coffee meetings for the remote employee with co-workers to help them acclimate.

[Reviews](#)

Stick to your normal schedule of reviews – if you typically hold 30, 60 or 90-day reviews, schedule those video meetings ahead of time with your remote trainees. Be sure to address how performance will be measured and consider how their performance could be impacted by the remote nature of their position.

Remote Onboarding:

Team Onboarding

- 03 Legal Documents [Kickoff Meeting with Manager](#)

Keeping face-to-face interactions is crucial to the successful integration of your remote new hire. Managers should reach out to their remote new hires prior to their first day to ensure they are set up for success when they begin.
- 04 HR Onboarding [First Day](#)

On their first day, Managers should lead the new hires through the function of their team, and the role of each member. This conversation will include an overview of the employee's role, the role of the team to the company, communication expectations and a layout of their first week.
- 05 Team Onboarding
- 06 Training

After they begin, consider setting up virtual coffees, happy hours, or team lunches. Since there is no one sitting next to them every day, it is easy for the remote hires to feel isolated. Organizing regular interactions will help them meet the team and feel in the loop.
- 07 Additional Resources
 - [1:1s](#)

Frequent communications between employee and manager is especially important when they are remote. Take the time to schedule weekly (or daily if needed in the beginning) video meetings with the employee to touch base on their onboarding and current projects.
 - [Schedule](#)

Giving your employee a schedule for the first several weeks of their onboarding serves the dual purpose of setting work expectations and holding them accountable to the work they are producing. Be sure to include breaks in the schedule throughout the day.
 - [Communications](#)

It is significantly harder to distinguish non-verbal cues or body language virtually, and because of this communication becomes more challenging. Set firm expectations around communication regarding priorities for the day, daily recap emails, addressing roadblocks, etc.
 - [Shadowing and Learning](#)

The remote nature of a new hire could make it harder for them to learn tasks that might be easier to learn in-person. For this reason, consider having them shadow projects by having a more seasoned employee share their screen to ensure they fully understand projects before jumping in. This also allows them the opportunity to ask questions beforehand.

Remote Onboarding:

Training

- 03 Legal Documents [Tech Training](#)

Remote employees should begin their onboarding with the IT department to ensure all their technology is functioning properly. They should have received the equipment and set-up instructions well in advance to prevent any issues on the first day. IT can then lead them through the basic functions of the communication platforms and video conferencing software that will be the basis of their training (see here for our [Sample Technology Setup Guide](#)).
- 04 HR Onboarding
- 05 Team Onboarding [Virtual Start Classes](#)

Have an entire training class starting soon? Train them virtually! Pre-record segments that occur frequently, or host classes live. Partner with your HR team and combine them with interactive sessions to provide variety in your sessions. By giving the classmates the opportunity to meet and interact with each other, they are creating a mini-community within the company who they can rely on in future.
- 06 Training
- 07 Additional Resources [Video Office Tours](#)

If your remote employees won't be visiting your office(s) for a while, considering filming an office tour! Film a walking-tour of the office, so they can have a visual of what working there day-to-day might look like. Additional info could include the best lunch spots in the area, proximity to public transport, and different activities to do after work for when they begin at the office.

[Virtual Buddies & Mentor Programs](#)
Pair the remote employee with a co-worker! This can be someone they can go to for answers to questions about the workplace that is separate from those they interact with every day.

Remote Onboarding:

Additional Resources

- 03 Legal Documents We've compiled some of the most useful resources about remote onboarding in the hopes that they are helpful for you, too.
- 04 HR Onboarding [10 Companies Share How They Approach Remote Onboarding](#)
- 05 Team Onboarding "Onboarding: an experience that's a little nerve-wracking—not entirely unlike the first week of your high school career, but more exciting and definitely higher stakes. This practice has evolved in recent years, expanding well beyond the bounds of the traditional human resource department..." [Read More](#)
- 06 Training
- 07 Additional Resources [How to Pivot to Remote Work During the Coronavirus Emergency](#)
- "As coronavirus (COVID-19) and chatter about it continues to spread, companies and their HR teams are taking action to keep employees safe. In the scramble, many have enacted coronavirus protocols that range from restricted travel to revised sick leave policies..." [Read More](#)
- [Compliance During the Coronavirus Disease 2019 Escalation](#)
- "Coronavirus Disease 2019 (COVID-19) has just been declared a pandemic by the World Health Organization, and is spreading throughout the United States and beyond. As a result, some businesses, public organizations, and even some countries are going on lockdown over health concerns..." [Read More](#)
- [7 Remote Employee Onboarding Tips and Checklist for Your Next New Hire](#)
- "Remote employees have gone from being the exception to becoming a major part of the workforce. With a larger population working remotely, there's been a change in how companies onboard new employees..." [Read More](#)