

A person's hands are shown typing on a laptop keyboard. The background is a collage of business-related items: a 'Sales Summary' document, a line graph, a cat's head, and various papers. The entire image has a reddish-orange tint.

Virtual onboarding checklist for employers

April 2020

Please note: This guide is assuming you have already made your hire and contracts have been signed.

FutureYou



How this checklist will help you

If you're an organisation hiring at the moment, you will be asking yourself, how do you onboard people remotely in the best possible way?

When you actually stop and reflect, it's likely you will realise that at least 70% of your existing onboarding processes are already online. Such as company documentation, training materials, processes, which are already available online for people to review.

Then the additional 30% is usually a mix of meet and greets and advanced training, both of which can which can still happen through video conferencing and screen sharing tools such as Zoom or Google Hangouts.

In the current environment, you have an amazing opportunity to refine your onboarding program and implement many of the best practices that will significantly improve your staff retention rate.

There are a number of elements to consider when onboarding new employees, however there is a greater level of preparation required to do this successfully for remote workers. In order to set a high level of engagement for remote workers, we at FutureYou have put together a detailed onboarding process that will assist you in this new remote onboarding process.

This comprehensive guide will walk you through the different stages of a virtual onboarding process, starting from the pre-start date all the way through to the second week and beyond. We have tried to make it as practical as possible and so have included checklists, along with what to include in your remote worker welcome pack. We will be offering our expertise and help to our clients as a complimentary service to support them through this evolving situation. If you need support, please reach out to one of our team.

The virtual onboarding checklist

Being prepared before the first day

1. Step one - Introduction meets warm welcome

Now is the time to settle in the new starters and hit them up with your personalised company starter pack. This will make your new hires feel comfortable and welcomed right from the start.

You can include:

- Branded merchandise, like a coffee mug or notebook;
- Outline of their first week's schedule;
- A welcome letter from their direct manager, or even the team or CEO.

2. Step two - New starter's schedule outline email

Starting a new role comes with it's own challenges so put your new hires at ease with an email of their schedule for the week with a clear outline of what you will be covering each day and in the coming weeks. If there is anything that the new hire needs to prepare for in their first week then this is a good time to explain this. Also, make sure you encourage questions and support at the end of the email and what number they can reach out to you on.



3. Step three - Get all things IT sorted

IT setup is tricky enough so getting on top of this earlier rather than later is ideal so you can overcome any issues. Send your new hires the IT processes they will need to follow and setup. This includes ensuring they have the relevant devices and software good to go from day one.

Make sure you have the new starters sorted with their:

- Monitor;
- Phone;
- Laptop;
- Mouse;
- Keyboard.

The first day made easier

4. Step four - Induction day online

Try to keep your induction day content the same as you would if you weren't remote so we advise you begin with a video conference call outlining the business, different departments and what role they play within that. This is also a great time to reinforce your company's mission, vision, values and any necessary frameworks that they may need to know. You will also want to introduce them to their team or any other important staff they should know before they get cracking into work. This means you will need to add these people onto your conference calls when applicable. Also, check in with the new worker to see if they have any questions that need answers.

5. Step five - Company culture and values

Trying to explain your company culture and values can be tricky when the worker can't see it in flesh. That's why we recommend showing photos, videos, or even your company LinkedIn page to try to portray your culture. This could even involve you explaining internal benefits, such as casual Friday, work drinks or, which events your organisation partakes in.

6. Step six - Workplace health and safety and human resource

Whilst your new hire is working from home, you still need to address the necessary WHS and HR regulations as they're still relevant and will be more significant when it is time to head back into the office. You will need to cover these policies as though they were in the office and still ensure that they're signing the documents and watching any educational videos on this.

7. Step seven - From messaging to video conferencing

This is now more important than ever. Make sure you introduce all messaging and video conferencing platforms to the new worker and get them to have a go at signing in. Also, make sure that they have the contact details of all of the colleagues they will be in communication with and show them where they can find out this information (e.g. excel sheet or contact address list).

The various communication tools could be:

- Team messaging tool;
- Video conferencing platform;
- Email.

Now for the first week

8. Step eight - Time for goal setting

It is crucial that you outline the new worker's goals and manage their expectations around this. You need to be very clear and concise on this and follow the SMART (specific, measurable, attainable, realistic and timely). We also suggest completing the following for them:

- Have their goals in writing and send to them after you both agree with them;
- Outline when you will catch-up about these goals and pop dates in the diary for them;
- Create a calendar so they can work towards the different dates for various goals;
- Reinforce the framework of short-term vs long-term goals so they're not overwhelmed;
- Ask them what they expect from yourself as the employer around these goals.

9. Step nine - Time for training

Arrange a video conference call to cover all training schedules and key stakeholders for this process. Make sure they have a copy of all their training modules and how each of them will be run. To ensure this training runs smoothly, you will want to:

- Provide logins for online training course or modules and include quizzes to increase their retention of information;
- Screen share over video conferencing to explain complex tasks;
- Catch-up after particular training modules have been completed and answer questions, or explain parts that may need further explanations or demonstrations.

10. Step ten - Online security and software

Online security is highly important when employees are working remotely. So now is the time to get your new worker on a call with your IT department or IT worker to ensure that they have got the necessary softwares installed but also explain how to avoid security issues. The worker should be comfortable with:

- Software and document/file sharing tools (e.g. Google Drive, Dropbox, wetransfer.com);
- Computer/ Cyber security - how to avoid getting hacked, installing anti-virus applications and how; to safely manage passwords and install two-step authentication.



The first week continued

11. Step eleven - Performance review and progress

When: Post first week, each month and quarter

Delivery: Email and calendar invitations

This is essential when working remote so that the new starter is aware of where they're doing well and where they may need further guidance and improvement.

Make sure that these progress and performance review meetings go ahead. It may not seem or feel like the right priority during these uncertain times but it will improve retention, increase work morale and help with their overall work ethic. We recommend you do more regular catch-ups with the new starters as they will need additional support and monitoring during this time.

12. Step twelve - The first in-person catch-up or virtual lunch

When you have the first chance to do an in-person catch-up, try and make it happen. This would either be having the direct manager grab a coffee with the new starter, or better a team lunch so that they can finally meet their team member face-to-face. If this can't happen in the near future, we suggest doing a team bonding session over a video conference call which could be virtual Friday drinks, trivia or deliver lunch to your team member's houses and do a lunch together over a video conference call.

13. Step thirteen - The final signature and updated contracts

Ensure the new starter has signed all of the required contracts, WHS and HR agreements and also the other key personnel. Now is also the time to consider whether your current agreement and contracts need to be updated now that your employees are working remotely. This may be an updated contract that not only your new starters need to sign but also your current employees.



The ultimate checklist

Make sure you have the below files ready to go:

- Employee welcome letter
- Outline of important organisation's dates
- New starter's schedule for the first month
- Company WHS & HS policies
- IT software & risk handbook
- Internal welcome new starter email
- Welcome new starter email to clients
- New starter welcome pack
- Internal employee contact information
- New starter checklist template: Before the first day
- New starter training list, documents and online modules
- Onboarding new managers checklist
- Welcome video from CEO or key employees
- Post swipe card or fob to new starter

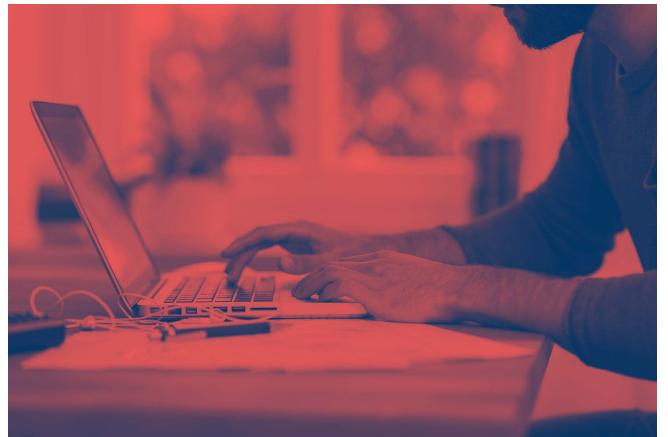


Virtual onboarding welcome pack

Introduction to the company

It's important that your new starters completely understand your organisation and how you operate on a day-to-day today basis. Your aim is to make them feel calm, part of the team and have an understanding of their role and what they can expect prior to their first virtual day with you. We recommend giving your new hire this welcome pack as soon as they have signed their employment contract, either send it to them via the post or virtually. If you do send it through the post, make sure you include some fun new welcome pack items such as, merchandise, or vouchers, or snacks.

1. HR forms, including:
 - Employment Contract
 - Emergency Contact form
 - Confidentiality and Company IP agreements
 - Company Policies acknowledgement
 - New hire's first month calendar
 - Safety Checklist and access to interactive modules
 - Cyber security document
2. Company organisation chart and an employee directory with all names, contact number and email addresses.
3. Video welcome message from a manager, team or CEO if possible
4. Reinforce the support aspects and that you are happy to answer questions or concerns before or after the new hire's first day
5. A guide with local hotspots, including nearby:
 - Cafes
 - Restaurants
 - Public transport



Get in touch

The power to connect without limitation.

If you require more assistance with virtual onboarding or any other recruitment related processes, such as outplacement services, we at FutureYou can assist.

We want to be there for you during these uncertain times to help you. This is why as a team at FutureYou we are offering a 60-minute Complimentary Talent Plan Review to talk to you about what we're seeing, what challenges you are facing and what our advice is during this period.

If you would like any assistance with the above or require more information, please reach out to us on info@future-you.com.au or call us.

Sydney

Level 45, MLC Centre, 19 Martin Place
Sydney NSW 2000
(02) 9195 2300
info@future-you.com.au

Melbourne

Level 28, 360 Collins Street
Melbourne VIC 3000
(03) 8547 1300
info@future-you.com.au

