

# How to onboard remote employees

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How to get your new member of staff set up, settled in and ready to go – even when you're not working from the same place.

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# Why is onboarding remote employees so important?

For many businesses onboarding remote workers is a new challenge, with large numbers of employees working from home during the Covid-19 outbreak.

An effective onboarding process is essential for integrating all employees – but is especially important for new remote staff who don't benefit from the usual face to face experience.

A great onboarding process will...



Increase worker satisfaction



Reduce attrition



Enable faster productivity



# What to do before your remote employees start

The onboarding process begins as soon as a candidate verbally accepts a job offer.

## Remote onboarding admin checklist

When an employee agrees to take a job, this sets the onboarding process into motion. You may need to tweak your usual hiring procedures for remote employees:



### Confirm contact details

Before doing anything, ensure that you have the correct address, phone number and email address for your new employee.

When working remotely, it will not just be contracts which may be sent to the wrong address, it could potentially be valuable IT equipment. Ensuring you have the right details will help to avoid any calamities.



### Right to work, identity and references

In normal circumstances, an employee would have to confirm their right to work, and identity, in person before they are sent a contract to sign. However, given social distancing restrictions which are currently in place, the government has relaxed these rules.

Now, identity verification can take place over video with a trained professional, making the system more secure.

You will also need to change how you gather references for employees. For example, [Reed Screening](#) has changed its referencing process to remove the risk of trying to contact referees from companies who are facing liquidation or only focusing on core activity during the pandemic.



### The contract

In theory, with postal services still running, you could still send out a contract to a new employee and they should be able to return it.

However, given there may be scenarios where employees are self-isolating – or you may require a quick turnaround – this can also be done digitally. Software such as DocuSign and Adobe Sign allow you to send official documents for employees to sign and return digitally, rather than having to resort to scans of signed documents.

# Providing technology for remote employees

Once you've got basic admin out of the way, your next step should be ensuring that your new employee has all the tools they need to do their job:



## Identifying hardware and software needs

Firstly, you must discover which hardware and software your new employee needs. Create a checklist to help discover what you need to provide for them. For example, if they have the latest, top of the line laptop and can access company systems from anywhere with ease, you should not need to send them a company one. However, if you have an internal network which they require access to, then you will need to send them equipment with company software installed.



## Sending and setting up equipment

Before you send company equipment to your new hire make sure they fill out and sign a form (ideally digitally via something like a Google Form) where they agree to your firm's equipment and device policies. When this is done, authorise your IT department to deliver equipment to your new employee's address. Once received, send them guidance on how to set up their hardware ahead of their first day. This should have visual elements so that your new hire can see if they are getting it right. A storyboard or step-by-step instructional video are the best ways to do this.



## Outlining systems and tools

Before you send company equipment to your new hire make sure they fill out and sign a form (ideally digitally via something like a Google Form) where they agree to your firm's equipment and device policies. When this is done, authorise your IT department to deliver equipment to your new employee's address. Once received, send them guidance on how to set up their hardware ahead of their first day. This should have visual elements so that your new hire can see if they are getting it right. A storyboard or step-by-step instructional video are the best ways to do this.





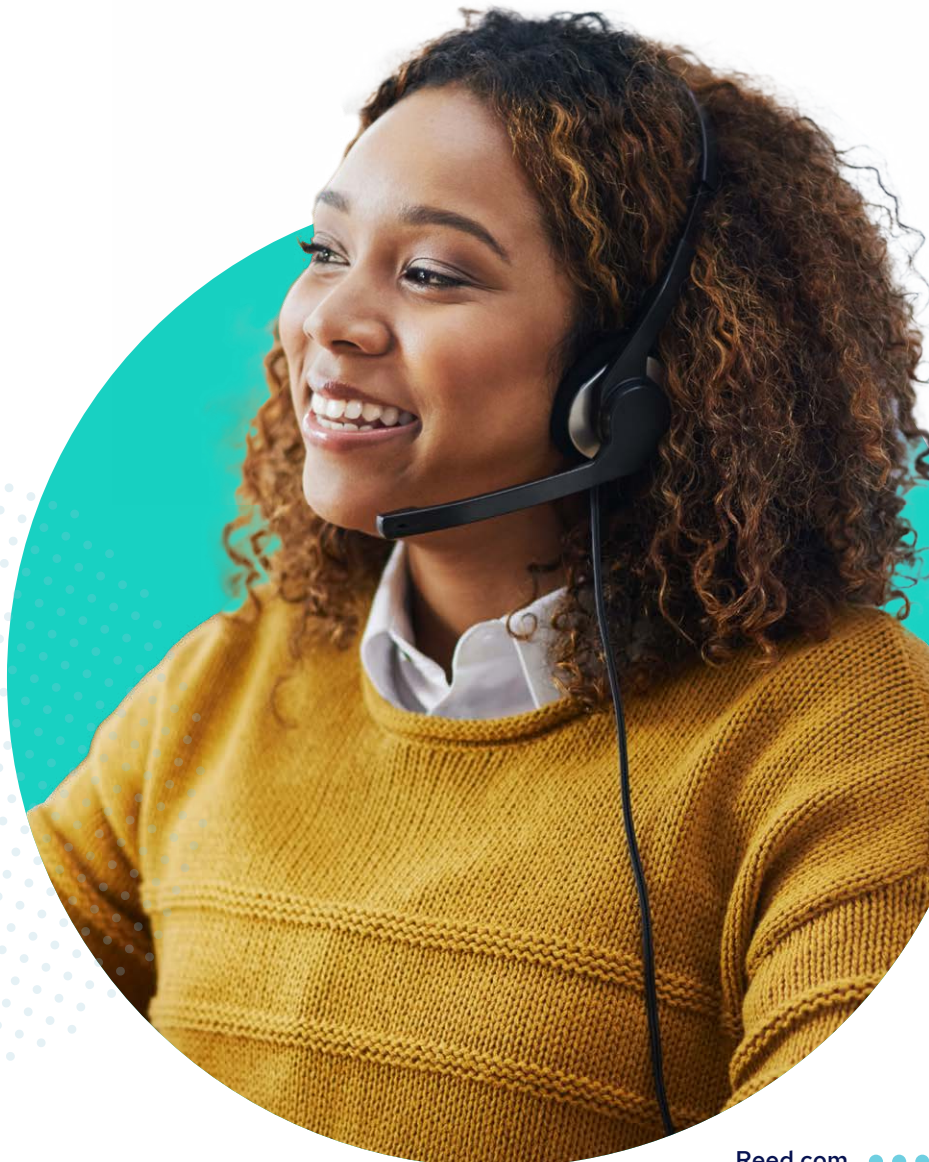
## General company IT setup

While you are already working with the IT team on an employee's equipment, ensure that they have also created their internal profile. This will include their email address, work phone number (if they are using a work mobile), licences for external software and an internal profile for HR use across areas like the company intranet. Also, if you need to use test accounts to help train your new employee, make sure that they are set up to use these too.



## How-to guides

As you will not be able to show your team member how to use work systems and tools in person, you should arrange for a way to do this remotely. You could arrange video calls with screen shares when they start to introduce them to these. However, an even more efficient way is to send instructions in advance, so your new hire can hit the ground running. If you are using software from external companies, such as Microsoft, they will have tutorial videos and guides to help users get to grips with systems. If you have time, personalise the process by either using company tutorials, or making your own to recreate the workplace feel, and make it seem like you are coaching your new hire directly.





# Sharing company information with remote employees

Now you have got your new starter set up technically, it is time to ensure that they have all the information about the company they need.

## Welcome packs

As with the contract, while you could still send this through the post, it is far more efficient to make this into a digital document for remote workers, sent after you have received their signed contract.

Rather than including every aspect as you would in a physical document, link to existing company information available online or on a digital information hub (see below). You could also personalise their experience by sending a welcome video from yourself and your team – you can record this on a video conferencing platform such as Zoom. In addition, you could send an e-card welcoming them into the team.

## Information hub

A company intranet will act as the hub of information for all company employees, however, your new starter will not have access to this until their start date.

Given new starters will want to find out as much as possible about who they will be working for, it might be worth creating a microsite to act as a digital information hub for new starters, particularly if you have numerous remote workers. As well as providing information on benefits, policies and the company history, you can also use it as a repository for any video tutorials which you have created – so they can access these at any time.

Download  
our **free**  
e-card  
template



## Making remote employees feel welcome

Finally, as your new employee will not be meeting their team members face to face, preparing to foster an inclusive environment for them from the very first minute is crucial. There are several ways to help create this environment:



### Team overview

Without the traditional tour around the workplace on their first day, you may consider going over who does what with your new hire before they start, so they understand where they fit within the team from the very beginning.



### Create team meeting

Your new hire will want to see their teammates on the first day, so book in a video conference call as early as you can so that as many of their colleagues as possible can attend and say hello.



### Assign a buddy

To help ease your new hire's transition into the company, you could assign them a virtual buddy to help guide them through the process. Identify the best team member to do this and give them plenty of warning so that they can allocate time to help their new team member.



### Send over first day details

Finally, and most importantly, make sure you know how your new hire's first day is going to work, then send them over the details. As they are not physically turning up to a place of work, decide a way in which they can signal that they are logged on and ready to work, and let them know what the plan for their first day will look like – from start time to what they will be doing.



# Remote employee first day plan

Your new starter's first day should include an induction into the company, introductions to the team and other key employees that they will be working closely with. Your overall objective, as it is when you are not doing this virtually, is to make them feel welcome from the start.



## 1. Set-up

First things first, although your new starter will have been sent IT hardware prior to their start date, make sure they have been able to set up all equipment correctly, and be on hand to help with this if necessary.



## 2. Induction videos

If you have not done so already, send pre-recorded induction videos to your employee with how-to instructions on the systems and technology they will be using – or plan in calls with the relevant people to show them how to use the systems. Give them plenty of time to complete these and do not overload your new starter with too much information on their first day.



## 3. Schedule

Set aside an hour for a video call at the start of the day to introduce them to the business and set out their plan for the first day/week. Provide them with a schedule for the day with set tasks for them to complete at specific times, including watching induction videos, virtually meeting the team and setting up their equipment/accounts. Organisation is even more important when inducting a new employee remotely, you need to make sure your new employee has plenty of things to complete throughout the day, as they will feel lost and uncertain with nothing to do and having to wait for instructions.





## 4. Introduction to the business

On their first morning, start with introducing them to the business as a whole, its history, ethos, and how it operates. Then in the afternoon, perhaps focus on the department they are working in, how it relates to the business' objectives, key stakeholders, and how the department/team is structured.



## 5. Team video calls

Schedule video calls with each member of the team or people your new employee is likely to be working closely with throughout the day where they can explain their roles in more detail.



## 6. Informal chat

It is important to make your new starter feel welcome in the team from day one. At the end of their first day, organise an informal video chat with the whole team.



## 7. WhatsApp

Make sure you add your new employee to your team WhatsApp group if you have one, or set one up if you do not. A quick channel of communication is important when your team is working remotely as you can share news/updates quickly.

## Top tip

Completing remote onboarding can be overwhelming. Space out learning to give your new starter a chance to absorb the information more easily and ask questions.



## Second day plan

The second day of induction should start to develop your new starter's understanding of their specific role through screen sharing with employees, to training videos.



### 1. Recap call

Organise a call in the morning to recap on the previous day's information, ask them how their first day went and allow them to ask any questions they may have. Then provide them with a structured plan for the day with set tasks to complete.



### 2. Screen sharing

Today should include interactive online training sessions and screen sharing with other employees they will be working with closely. Schedule these, and after each session check in with your new employee to allow for questions and answers.



### 3. Compliance and policy training

In addition to role specific training sessions, set aside time for your employee to complete any compliance and policy training.



### 4. Coffee catch up

Now that your new starter has virtually met the rest of the team, you should partner them up with an experienced member of the team to act as their virtual mentor. This person can be on hand to answer any questions, provide support and share their experience of the business. Organise a 'coffee and catch-up' session between the new starter and their mentor in the afternoon to allow them to get to know each other.



### 5. Quiz

Set up an informal team video call at the end of the day. Virtual team building is essential for morale, motivation and bringing a team together. Try asking icebreaker questions, an afternoon quiz, or have a team member do a mini presentation on something they like.







## Rest of week one

The rest of the first week should include further training sessions, setting out the plans for week two, and checking in with your new starter to make sure they are settling in and to assess if there is additional help they need.

1.

Continue to provide scheduled training plans throughout the rest of week one. Have different members of the team, or subject matter experts provide some of the sessions to offer different insights and perspectives.

2.

Try to add some variety with online training sessions, one-to-one video calls, group video training sessions, and e-learning videos to keep them engaged.

3.

Make sure you still conduct daily video calls at the start and end of the day, with catch ups in between.

4.

At the end of the first week, schedule a call and ask your new starter to go through what they have learnt this week, and what their key takeaways are. Ask them how they have found the first week and if there is anything they would like to know more for the following week. Ask your team/new starter if they are happy with communication methods and adjust to suit their needs (what would they like more of).

5.

Provide them with a brief overview of how week two will be structured.

# Remote employee second week plan

The second week of induction should be focused on more practical aspects of their role, that gives them a chance to test their knowledge and put it into practice.



## 1. Call

Set up a call at the start of week two to recap what they learned in the first week and give them a schedule for this week.



## 2. Online training tasks

The second week will most likely still include training sessions, but now is the time to introduce practical tasks that the employee can complete throughout the week.



## 3. Feedback

Provide timely and detailed feedback on all work completed. Do not wait until the end of the second week before you give feedback, or it could have been a week wasted. Providing feedback via video calls and screen sharing is preferable and allows for a detailed discussion to help your recruit get a better understanding of what is needed or expected of them.



## 4. Dummy account

Even if your employee is not ready to take on actual cases or projects, use dummy/test accounts where they can test their knowledge.





## 5. Video calls

Continue to have daily video calls with them to go through the day's work.



## 6. Feedback and key learns

At the end of week two, it is important to set aside an hour with your employee to reiterate key learns, what is expected of them moving into week three, and ask your employee for feedback on their induction so far.



## 7. Informal chat

Finally, make sure you think about the wellbeing of your digital recruit – they may feel isolated and lonely during the lockdown period. Point them in the direction of your employee assistance programmes if required.





# Ideas for virtual team building

Virtual team building is essential for morale, motivation and bringing a team together. Why not try some of these examples:

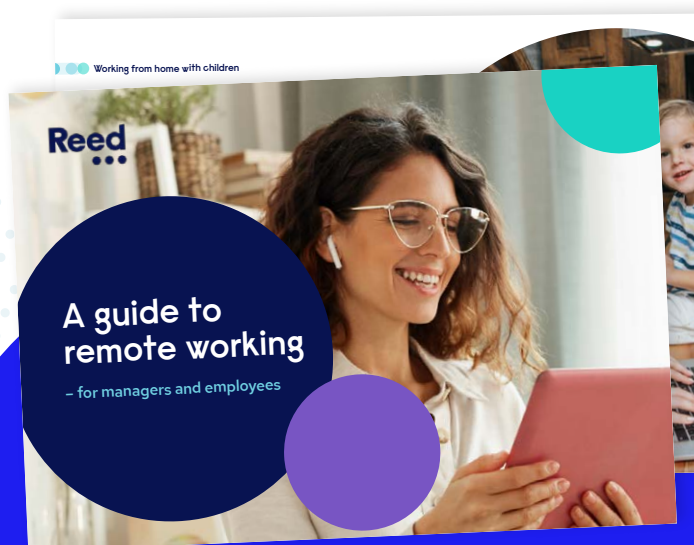
- Try a Friday afternoon video quiz or virtual pub quiz with the team
- Get all team members to show their favourite photograph on video call and talk about why it is their favourite
- Schedule a 'coffee and catch-up' call where you don't talk about work for 10 minutes and allow for a casual conversation
- Ask your team to do a virtual tour of their working from home space
- Have a team member do a mini presentation on something they like
- Bake off or cooking demonstrations/lessons
- Guess the baby photo
- Games nights

# Ongoing induction

Successful onboarding and induction processes are not a one-off. It is a continuous process, that takes organisation and dedication from hiring managers. A lack of face to face contact means it will take more time and effort to ensure your new employee can adjust and acclimatise to their new working environment and role.

While the first couple of weeks will provide insights into the business and practical skills to conduct their day-to-day role, the ongoing induction process should aim to develop their skills and knowledge, using effective feedback and coaching methods.

If done well, the induction process will lay the foundations for important relationships within the team and across the wider organisation, and give them the best possible start in the business.



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