ORBIS CONSULTANTS

VIRTUAL
ONBOARDING GUIDE

WHEN ONBOARDING IS DONE VIRTUALLY, IT IS EVEN MORE CRITICAL TO GET THE EXPERIENCE RIGHT.

New employees who join the business on a virtual basis may not be in the corporate headquarters or the local office. Remote employees may be onboarded due to unexpected conditions, as a safety precaution or because your organisation wants to enable employees across the world who are best suited to certain roles and functions. The work employees produce is more important than the location they are doing that work in.

Onboarding is the first official impression of your company. In a typical scenario, an onboarding process would take place in a series of face-to-face meetings, a physical tour of the office and training sessions. It is integral these practices remain within the process, just on a virtual basis instead.

You can use internal platforms for scheduling, communications and meetings so that the initial setup is productive and entirely transformed to a virtual format.

One-to-one meetings with HR, direct managers, leadership, and the wider team can take place over video conferencing platforms.

The key is to use the right tech solutions to automate and optimise the process, so the right people participate, the right knowledge is shared, and necessary actions come out as a result.

If it is an unprecedented situation, all departments need to ensure they are prepared to adapt and pivot around a virtual onboarding process. Whether this is for globally distributed and remote teams, or an individual typically in a central office location, on a working from home basis.

Virtual onboarding process' are rather obviously heavily reliant on technology but there are key steps to take to develop and implement a successful one.

Be strategic about the tools at your fingertips and equip your leadership team with the best set of tools to manage their teams, whether they are working within the same location, or remotely.

CONSIDERATIONS FOR ONBOARDING REMOTE WORKERS

PRE-BOARDING

Set expectations during the interview process. Define and outline plans on:

- Workload management
- Hours of work
- Accountability
- KPIs

IS YOUR EMPLOYEE BRANDING ON-POINT?

Having not stepped foot in your office, remote workers rely more than most on your social media channels and website to gauge culture and vibe.

INTRODUCE THE TEAM

Set aside time to properly introduce your new employee to their colleagues & use video. It'll take a bit more thought and planning when you're not in the office but it goes a long way when done right!

THINK OUTSIDE THE BOX

Post a welcome letter along with useful hard copies of information. Branded merchandise (pens, company hoodie, notepads) or a gift, such as a pamper package to relax after their first week.

ON THEIR FIRST DAY

- Welcome email to the whole team
- Welcome handbook
- Induction meeting
- Access to company policies
- Company org chart
- Payroll information
- Set up and work through shared workflow document

EQUIPMENT & TECH STACK

Make sure they're all set up and ready to go from day one! Hardware (laptop, headset, phone) software (logins, passwords, mail lists, access, permissions) and network (download / upload speeds)

WHO'S WHO

Make sure your new start knows who to go to for help and support

- Reporting line and management
- IT & Tech support
- Facilities
- Health & Safety
- Cross Departmental

CULTURE IS KEY

Keep your culture alive with daily departmental video chats, team based weekly challenges, virtual games & quizzes, team drinks at your virtual video bar.
Remember to ask for feedback and ask remote workers how they feel, what could be improved and constantly tailor your practices and evolve your process to suit.

STREAMLINE ACTIVITIES

For new starters to warm up, learn skills and tasks necessary for their role, they'll need their task list to be kept to a minimum and increased on a gradual basis. The introductory phase shouldn't test the ability of a new employee to perform their job, this will only increase stress levels, anxiety and an early turnover of staff.

It's important to share information and promote engagement, but this must be measured and suitable for their personal goals. Streamline their incoming activity so that they are set up with a satisfying head start.

SCHEDULE 1:1 TIME BETWEEN MANAGEMENT AND THE NEW EMPLOYEE

Often overlooked by HR, it is assumed managers already know this, but it contributes hugely to the success of an onboarding process. They must carve out time to meet with their direct reports regularly with video calls and set up easy communication channels for fluid reactive support.

Organise virtual coffee meetings between senior members of the leadership team with individuals across the business, and most importantly, new employees.

If your organisation is too large for individual coffee meetings over video, you could set up a video conference for the CEO, questions can be submitted live and you can record the event for globally remote employees to view later in their local time zone.

UTILISE DIGITAL TOOLS TO DESIGN SHARED COMMUNITIES AND ENCOURAGE ENGAGEMENT.

Physical distance often pushes employees to isolate themselves from non-business critical or social conversation and activities, disengaging them from the community. New hires are commonly fallen victim to this as they haven't had a chance to experience the physical team culture. Digital platforms and social networks are powerful tools to use and an incredible ability to connect remote individuals who are dispersed all over the globe, together in one central point – a virtual common room so to speak.

Creating internal communication channels can create engagement amongst your workforce and new employees should be welcomed to these channels.
They may be unsolicited and unessential to providing corporate approved content and messages, but it is essential for internal team communications and maintaining company culture.

Regardless of employer ranking, these channels must break through any issues of disengagement and be encouraged as an honest platform where employees can speak freely as themselves, sharing knowledge, extracurricular activities and fun competitions. Businesses should be keen to take advantage of the collaborative nature of social tools.

WORKFLOW SCHEDULE

Set up a centralised workflow document that all the relevant onboarding team can access. Assign responsibilities, list all touch points and allocate a traffic light system for clear communications between teams through out the onboarding progress and introductions.

'HOW I WORK' DOCUMENT

Direct reports can fill out a form that details their preferred feedback style and meeting preferences. Have a look at our 'How I Work' template which you are welcome to use.

FEEDBACK FORM

Feedback is key to success. Accommodate and adapt, one size doesn't fit necessarily fit all. If there are things you can be flexible on, ask remote workers what works for them. Find out how they prefer to work and accommodate this if you can. Evolve and constantly improve the process.

- Was the content right?
- Was it delivered in a manner that was easy to access and understand?
- Did it make a difference?
- Are the new hires in fact better prepared and able to be productive more quickly?
- Did it influence how they were able to effectively integrate into the organization?

TECH STACK & HANDY TOOLS

VIRTUAL ONBOARDING CHECKLIST

- [ ] Onboarding welcome pack
- [ ] Complete new hire forms
- [ ] Share employee handbook
- [ ] References and background checks
- [ ] Prepare and send equipment
- [ ] Set up new accounts on all relevant platforms
- [ ] Share login details and access details with new employee
- [ ] Ask new employee to complete 'How I Work' form
- [ ] Share workflow document for assigned responsibilities
- [ ] Set out training and introduction schedule
- [ ] Share centralised training and learning hub
- [ ] Organise 1:1 meetings with line manager
- [ ] Prepare team introductions
- [ ] Invite employee to social team channels
- [ ] Assign 'buddy' and periodic check in points
- [ ] Review initial work schedule and performance evaluations
- [ ] Encourage new employee to follow the company's social media
- [ ] Ask new employee and line manager to complete 'Feedback' form