

Virtual Onboarding Guidance

Social distancing and remote working arrangements are the new normal, and companies across the country are faced with the prospect of onboarding new employees virtually. Successful virtual onboarding is dependent on both more planning and more structure than usual, to make up for the absence of situational or on-the-job learning opportunities. With forethought and intentionality, companies can ensure a smooth and efficient onboarding process that minimizes anxiety and maximizes social connectivity and business productivity in a virtual environment.

Pre-Hire Checklist:

- 30 Day Action Plan & Weekly Schedule
- Hardware & Software
- Mentor Assignment
- Org Chart with Contact Information
- HR Welcome & Paperwork
- Up to Date Employee Manual (edited with remote instructions)

30-Day Action Plan

- Assume first 30 days will be completely remote, then reassess each week. Estimate that new hires will operate at 60-80% normal level of productivity.
- Establish written 30-day goals:
 - Job-specific goals
 - Operational onboarding and systems familiarity goals
 - Social goals for internal relationship building
- Weekly Schedule should include time-blocks and scheduled videoconferences with manager, mentor, peers, direct reports, and other important contacts across the organization. This level of scheduling will feel like “micromanagement” but will provide new hires the comfort of clear expectations absent normal social and visual clues.
- Sample weekly Candidate Activities:
- 2x videoconference with supervisor.
 - First call focused on agenda for the week.
 - Second call focused on feedback and learning opportunities.
- Videoconference coffee with Mentor
 - Weekly to talk, vent, ask questions, etc.
- Videoconference with Human Resources

- Continue to instill the culture and be able to offer assistance.
- Videoconference with IT (as needed following first few weeks)
 - Troubleshoot issues
- Videoconference coffee with colleagues in adjacent departments.
- Weekly wrap up videoconference coffee Manager and Team

Hardware & Software

- Ship laptop, phone, parking pass, key fob, etc. to arrive at least two days before start date.
- Make sure all programs are pre-loaded and functional.
- Include cheat sheet for usernames and passwords.
- Extra points for a handwritten note or piece of company swag!

Mentor Assignment

- Mentors provide insight and guidance into the culture, norms, and politics of an organization. While normally this type of relationship forms organically over time, virtual onboarding calls for a mentor to be nominated.
- Should not be a supervisor or direct report. Ideally would be an experienced peer level colleague with institutional knowledge and relationships. Mentors must keep contents of discussion confidential.
- No goals, no agenda. Mentors are simply a friendly resource.
- Mentor should reach out on new candidate's first day.

Organizational Chart with Contact Information

- An organizational chart helps new employees visualize the organizational structure.
- Organizational chart should be updated to include contact information for all relevant company executives, peers, and direct reports.
- Organizational chart should align with monthly videoconferencing schedule.

HR Welcome & Paperwork

- Just like a normal HR intake, except delivered via video.
- Videoconference with HR representative for welcome & onboarding review.
- Paperwork presented and completed digitally or mailed as necessary.
- I-9 requirements adjusted for social distance.
- Follow up videoconferences scheduled for second, third, and fourth weeks as well, can be kept brief.

Employee Manual with Remote Instructions

- Standard employee manual should be carefully reviewed in light of virtual onboarding and remote work. Some policies and procedures may have to be tweaked.
- Special attention should be paid to providing detailed instructions and guidance on all company systems that the new hire will need to utilize.
- Easy access to relevant files, policies and procedures, payroll and benefits information, etc. can make the difference between a productive and frustrating day.

Virtual onboarding may be unfamiliar, but necessity is the mother of invention. With careful planning and an emphasis on frequent, scheduled videoconferences and phone calls, new hires can build meaningful relationships, become indoctrinated into company norms and culture, and achieve strong productivity from the comfort of their own home. Here's hoping for a quick end to COVID-19!