



THE ULTIMATE GUIDE TO ONBOARDING REMOTELY

2020 has been the year of remote working.

The coronavirus outbreak has caused the way we live and work to change dramatically. For the organisations that have continued to operate throughout the pandemic, finding virtual solutions to new problems has become a way of life.

Virtual interviews and remote onboarding – both practices which were uncommon before the outbreak – have been adopted by a growing number of organisations. But while some organisations are now remote onboarding, it is not a new concept.

When building your team, hiring is only half the battle. Proper onboarding techniques must be in place to ensure your new team member integrates successfully, only then will they thrive and add value to your team. Adding the challenge of physical distance into the mix can mean that onboarding remotely can be tricky.

This report is all about virtual onboarding – it contains best practices, common challenges, and at the end, there's a checklist for a foolproof virtual onboarding process.

Remote Onboarding - Standard Practice or Necessity?

With the rise of the internet, the number of people working from home has increased steadily year on year. In the decade from 2008 – 2018, the amount of UK remote workers increased by 25%.

A 2019 survey found that globally, 61% of employers allowed their employees some sort of remote working policy, and a staggering 76% of workers said they would be more loyal to their employers if they had flexible working options.

While for some businesses, current circumstances dictate whether they onboard remotely or not, but for many organisations, it is standard practice.

IT giant Dell use remote onboarding as part of their standard hiring process due to their widely dispersed workforce. A spokesperson from Dell has said about their process, “We have all of our onboarding materials in a digital format, including a website, documentation, and video. We also have a Day 1 success team that is dedicated to providing support via chat/IM, email, and calls during the early part of onboarding.”

Online billing software providers Chargify also uses technology to remotely onboard; they schedule Facetime meetings between new employees and managers during the early stages.

As you can see, it is essential to have a tried and tested, robust remote onboarding process if your virtual employees are going to be onboarded successfully. Still, if you are onboarding virtually out of necessity, you will probably lack such a process.

The Benefits of an Onboarding Process

Building a high-performing team in your sector is not an easy task. Employee turnover is steadily increasing in many industries, and the old rule that you generally stay in a new job for a minimum of two years doesn't apply anymore.

Studies found that 33% of all new employees quit within their first six months, and 86% of participants in one survey said the risk of damaging their CV from moving quickly from a job that wasn't working out wouldn't outweigh their decision to move.

When you find a candidate, who is a perfect fit for the role and your company, you must work ever-harder to keep them. Organisations with effective onboarding and induction programs achieve a 50% better new hire retention.

The main benefits of a competent onboarding process include:

- Reduction in the cost of turnover – businesses spend significant amounts on re-hiring; the real cost of hiring an employee on £27,000 is actually nearer £50,000.

- Boost in productivity – it can take up to 8 months for a new employee to get up to speed; a robust onboarding program can cut this time dramatically.
- Strengthening your company culture – it is widely regarded that companies with the best cultures fare better in all other areas. Improving your company culture should always be a top priority for you; there is a dedicated section on company culture during onboarding later in this report.
- Improvement of your employer brand – a positive employer brand is one of the best ways to attract future talent, especially in the age of the online review. Once you have interviewed and decided upon your new employee, it is time to start the virtual onboarding process, starting with the contract signing.

Virtual Contract Signing

Once you've found the new individual you want on your team, it's time to get them officially onboard.

As this process usually happens via phone and email, it shouldn't be too different for candidates who have been virtually interviewed.

It just means that if you want them to sign their contract before their start date, you will need to invest in some online contract signing software. Not all employers choose to get contracts signed straight away; some leave it until after the employees' start date. But in light of the coronavirus, and uncertainty about when physical workplaces will open up again, it is always best to get the contract signed as early as possible – it assures both you and the employee.

There is a range of different virtual signing software, such as Adobe Sign and HelloSign – shop around and find a package that best suits your needs. While most are, make sure the virtual signing software you use is legally binding too.

Photocopies of documents such as passports, birth certificates and any other form of ID you require can suffice in the event of you not being able to see physical versions.

At this stage, it is essential to keep in close contact with your new employee. If they don't sign their contract straight away, it might be a simple miscommunication, or it might be a sign of something more serious. So, keep in regular contact to make sure you and the new employee are always on the same page.

Once the new employee has signed their contract and you have confirmed a start date, it's time to start organising their materials.

Providing the Right Equipment and Collateral

Before your new employee's start date, it is essential to ensure they have everything they need to hit the ground running in their new role. Nothing halts progress at the start of a new position more than not having the right tools to do your job. With this in mind, it is never too early to send out your new hire's equipment; it is far better that it arrives early than late.

In terms of equipment, you will need to consider if the employee needs:

- A computer (laptop or PC – PCs are considered much better in terms of productivity, but you will need to ascertain if there is adequate space and also provide a desk)
- Speakers, headset, webcam, additional USB hub
- Work phone and SIM card
- Welcome pack including company information, an outline of their role, a copy of their contract and all new email, username and password information they will need for their new profiles
- Stationery, such as writing pads, pens, empty binders
- Business collateral – some organisations include personalised mugs, water bottles or t-shirts; which can help the new employee feel integrated into your culture

You should also find out what kind of internet speed and system the employee currently has. Many domestic broadband providers do not provide the bandwidth necessary for business tasks, especially if the role involves lots of uploading and video conferencing.

You must determine the new starters Wi-fi needs – if they will be using their Wi-fi, is it strong and secure enough to meet the needs of their new role? If not, you will need to supply them with an alternative internet supply such as a modem or a mobile broadband device.

At this stage, it is a good idea to discuss your new starters working arrangements. Do they have a dedicated working space or a home office? If it is the first time they will be working from home, they might lack a suitable space. You can offer guidance on what constitutes a good remote working space – somewhere quiet with minimal distractions. Of course, everyone has their working style, and aside from asking if they feel that they have a suitable space, their working style will be something they figure out on their own.



Communicating Your Company Culture in a Virtual Setting

Your company culture is a critical component of what your business stands for and how it operates – it should form part of your company DNA. The term ‘cultureboarding’ now exists to describe forward-thinking companies who have a significant focus on workplace culture during their onboarding process.

When thinking about how to demonstrate your company culture to a new employee, here are some points to consider:

What does your company culture encompass?

What is in your code of conduct?

Do you have a vision and mission statement?

How involved are senior leaders in the onboarding process?

Do you have certain things that you do daily or weekly, such as lunch meetings, catch-ups, or Friday round-ups?

But when a big part of company culture relies on the camaraderie of the physical office environment, it can be more challenging to get your new hire to feel appropriately integrated.

The most effective way to get around this problem is to make use of video calls – they will be your answer to the remote onboarding problem.

Time zones allowing, include new employees on video calls with as many of their new colleagues as possible; of course, this will depend on the size of your organisation. As I mentioned in the previous bullet points – do your new employees generally get introduced to senior colleagues? Failing to do this can lead to them feeling undermined or excluded from your company culture. Aim to introduce new employees via video to as many senior members as possible, and yes, this includes CEOs and MDs.

Going forward, make sure that they are regularly included – daily is best – on video calls with colleagues that they will be working closest with, for at least the first month. These only need to be quick 5-minute catch-ups in the morning, but they will strengthen employee bonds significantly.

Before the new employees start date, make sure you add them on appropriate social media platforms that you need to be connected to for work, such as LinkedIn, or your company Facebook. Remember to ask them if they are comfortable using their personal social media for work – if not, arrange for them to set up separate work profiles.

Additionally, instant messaging groups such as WhatsApp and Facebook Messenger or Slack can be invaluable to help employees integrate during the early days. These can provide quick answers from colleagues or managers about smaller queries that the new hire might have.

Of course, it will not be feasible for remote employees to physically join in with team lunches but aim to incorporate them as much as you can. Invite them to all work events, even if they can't attend – this way they won't feel excluded.

Finding a Compromise Between What Works for Them and Also Works for You

After the induction process and any initial training (which can take anywhere from a few days to a few weeks), an essential part of the onboarding process is to find a compromise between the working style that works for your organisation but also works for the new employee.

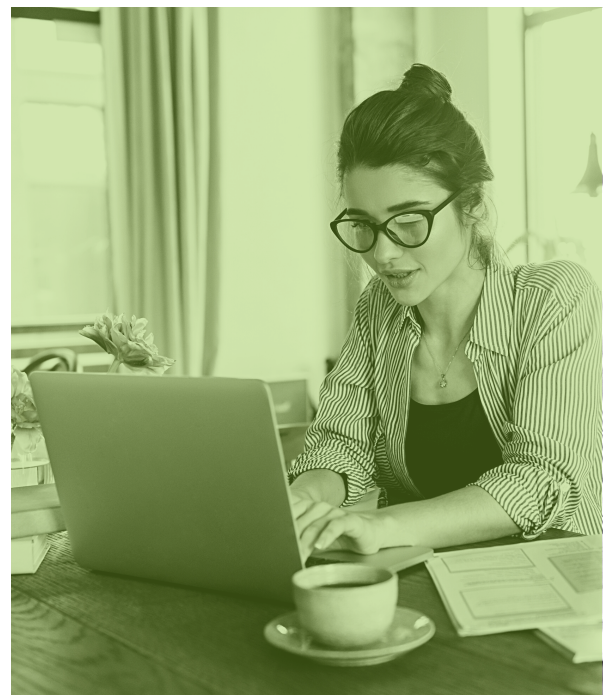
During the induction, make sure to have a conversation about the employee's preferred working style. You can establish this during the interview, with the question 'how do you like to be managed?' or similar. A good way to find out about the employee's preferred working style is to have them complete a 'How I Work' questionnaire. This type of survey lets you get to know your employee better, to find out if they are more, or less likely to ask for help, if they prefer working alone to working in groups, etc.

At this stage, the importance of keeping in touch with your employee cannot be overstated, even if they tell you they prefer a hands-off working approach. Once they settle into their new role, you can slip into the working style which suits you both (such as less, or more input from you) but at first, a continual connection is what's needed to form the bonds that create a robust employee-employer relationship.

Key milestones during your remote employee's new tenure are – the first week, the second week, the first month, and then subsequent months, usually quarterly.

The general consensus from HR professionals is that onboarding should take three months minimum, and some argue that it can take up to an entire year.

During these milestones, you must keep a record of your new employee's performance, to help them by giving feedback. Next, let's take a look at the importance of consistent reviews during the remote onboarding process.



Reviews

Many organisations shy away from consistent reviewing of their employees, for many reasons, including time constraints or a lack of adequately trained management. But reviews are incredibly beneficial, for both employee and employer, who will get a great deal out of the process when appropriately undertaken.

Provide your employee with a framework of what their reviews will look like. This should include the questions you are going to ask, such as what they have found to be challenging and what they are enjoying.

Formal reviews are so much more constructive for everyone involved, compared to giving verbal feedback only. The documenting of challenges, goals and outcomes gives the new employee a clear path of what to aim for too.

Remember to include a section where the new hire can give their feedback on the remote onboarding process. This part will be invaluable to you in modifying the process so that you can improve it over time. As I mentioned, appropriate milestones for video reviews are as follows:

Week One

A review at the end of the first week should aim to cover any teething problems that might have arisen, to check that your employee's tools to do their job are working correctly, and for them to ask any questions about their role that have initially cropped up.

There will always be something that the employee thinks of that you might have missed, so inviting a two-way conversation at this point is very useful indeed.

Week Two

At the end of week two, hold another review. This time ensure any problems from week one are fixed, and the employee is more settled within their role.

At this stage, you might expect some feedback about systems and processes, now the new hire is more familiar with the role.

First Month

The end of the first month will be the first time you get a good idea of how well the employee is doing in their role, the speed of which they are completing tasks, and with how much ease.

This review is a good time to have a frank discussion about how you feel the employee is performing in their role and setting out aims and objectives for them for the next three and six months. This review should feel more like a standard annual review and should be longer to reflect this.

The framework for your first-month review should then be used again during subsequent discussions, typically at three-month intervals for the first year. You should track goals and aims so that you can draw up objectives and actions for the employee during their quarterly reviews.

This robust review plan should help the employee feel secure, confident and connected to their new role, despite the physical distance.

Finally, here is a checklist of everything to consider when virtual onboarding.

Remote Onboarding Checklist

- In the time between the job offer and their first day, check-in with them regularly via email or a phone call.
- Get the new employee to email over the details you need to add them to payroll, plus copies of their passport, birth certificate and other forms of ID.
- Check with the candidate what collateral, hardware or software they are missing that they need to do their job.
- Arrange and send their laptop or PC, all associated software and hardware via a tracked courier service.
- Get the new employee set up on the necessary systems such as email, Office 365, cloud systems etc.
- Add the new employee to WhatsApp/Facebook/Slack or other messaging groups.
- Add the new employee on social media such as LinkedIn, and get their new colleagues to do the same.
- Send induction/welcome pack containing information about the company and branded collateral.
- A couple of days before their official start date, check with them that everything is ready and they've got everything they need.
- Set up reminders for video calls for daily and weekly induction check-ins.
- Send and go through with them a document outlining the review process.
- On the first day, conduct a video induction going over the role, duties, expectations and company culture.

This guide and checklist will help your remote onboarding practices going forwards. And remember, remote onboarding does not have to be challenging; it can be simplified when you follow cohesive processes.

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