



# ALL ABOARD!

## Your Remote Employee Onboarding Checklist

Remote employees have now become a viable pool of talent for nearly every company, so it's more important than ever to have a process in place that not only puts your new hires at ease as their first days approach, but also allows you to onboard virtually. Consider this guide a template for developing and customizing your remote employee onboarding process.

### Pre-boarding

#### 1. Human Resources Communication

Before your new hire's first day, be sure to reach out to him/her at least twice:

- 1) Welcoming them to the team and offering availability for any questions
- 2) Providing guidance and an agenda for that first day

#### 2. Hiring Manager Communication

Welcome your new team member by sending and offering any optional pre-reading or resources. This makes your new employee feel welcomed, confirms their start date, and also sets the stage for building a collaborative relationship.

### Onboarding

#### 3. Prep Equipment

After discussing needs with your new hire and the hiring manager, order computers and other hardware your remote worker needs well ahead of the start date. Confirm they have received all necessary equipment for their work and ask your IT department to assist them with setup, if necessary, on their first day.

Also consider some supplemental deliveries that include company-branded swag... a coffee mug or water tumbler, a personalized gift like headphones, gift cards from local or online stores, or a welcome letter from the CEO or key personnel. These are all nice touches that can help make your new hire feel like part of the team right from the start.

**Key Personnel Involved:** \_\_\_\_\_

#### 4. Ready the Paperwork & Benefits Presentation

Time to get ducks in a row. Make sure to walk your new hire through important paperwork, benefits, and critical deadlines for submitting that HR paperwork. Consider using an e-signature tool, like HelloSign or DocuSign, so that employees can add their signatures digitally and share contracts with you in a secure environment.

**Key Personnel Involved:** \_\_\_\_\_

#### 5. Set Role Expectations

Prompt hiring managers to set specific goals and expectations. Remote workers should not wait until their manager is online to learn what their next tasks are. Hold your hiring manager accountable for:

- Creating and walking through a list of tasks that help new hires learn about the role, their direct team, and its goals
- Explaining communication expectations, working hours, etc.
- Defining short-term and long-term goals
- Outlining and sharing their goals for the first 30, 60, and 90 days. Use a project or performance management tool, detailing what success looks like during their first 90 days.
- Scheduling weekly one-on-one meetings to discuss upcoming projects, progress, and resolve potential issues.

**Key Personnel Involved:** \_\_\_\_\_

#### 6. Empower Communication

Provide access to all of the relevant team and company systems and tools...and ask them to create their user accounts in all of those company productivity, security, HR, and communication & collaboration tools. Ensure new hires understand how to use your communication tools. Describe the best ways to contact team members and how to troubleshoot communication technology.

Provide your new hire the opportunity to take or re-take their Humantelligence self-assessment, now that they are an official part of the team. This will help you continue to optimize your hiring plans and manage culture more intentionally with every new hire or departure. To get a glimpse into the Humantelligence self-assessment, [take your 12-minute assessment](#) here and receive a complimentary version of your report.

Give a tour of your intranet, google drive, or any other repository that provides guidance on how to set up:

- Email signatures
- Group messaging tools
- Video conference software
- Any boilerplate and templates for use (i.e. digital letterhead, presentation slides, etc.)
- Encourage them to follow the company's social media channels to stay up on news too!

Be sure your IT and corporate communications function support these activities.

**Key Personnel Involved:** \_\_\_\_\_

## 7. Make the Introduction Rounds

Introduce the new hire to the team before they start and when they start. Write a [welcome letter](#) to share with the company. Invite them to key video meetings in order to introduce them to groups – allowing them a minute or two to say a few words and share a fun fact. Be sure they are now included in any recurring meetings, including town halls.

In our monthly company meetings at Humantelligence, we always start with a round robin of fun facts...it's a great way to find common connections.

**Key Personnel Involved:** \_\_\_\_\_

## 8. Facilitate Meetings & Trainings

Set 1:1 meetings with their manager and important cross-functional partners to get to know all the people they'll be working with. It's often challenging to train remote employees, as real-time communication is usually limited. To effectively train remote workers, consider:

- Using interactive training courses that are user-friendly and include games and quizzes to boost engagement
- Recording product demos to better explain solutions/features through video
- Following up after each training session to answer questions

Arrange a training with your IT department. Remote workers should get familiar with:

- File-sharing applications and cloud backup software (like Google Drive, Dropbox, etc.)
- Computer security
- Password management, VPN, and data encryption tools to protect their devices

It's important that during their first days, remote employees meet with their coworkers, manager, IT department, and direct reports along with employees from other departments within whom they'll work closely.

**Key Personnel Involved:** \_\_\_\_\_

## 9. Share Onboarding Support Materials

Create and share a repository of market and company-specific articles and resources so your new hire can begin absorbing knowledge about what your company does and for who.

**Key Personnel Involved:** \_\_\_\_\_

## 10. Facilitate Connections

Another key aspect of onboarding is about bonding with the team. Set up an introductory lunch or virtual coffee chats with team members or identify "remote buddies" so they can set up calls and get to know each other.

If you're a hybrid organization, pair a new remote employee with an in-office employee so they have a key point of contact (besides their manager) onsite. If your new hire is based near an office, consider having them work from that office during their first week. If that's not feasible, invite them on-site as soon as possible, so they get to know coworkers in person.

If all employees work from home, make sure to schedule quarterly or annual events or retreats, where entire teams get the chance to meet.

**Key Personnel Involved:** \_\_\_\_\_

## Beyond Onboarding

### 11. Continuous Onboarding

More than 20% of turnover takes place in the first 45 days, so continue checking in and scheduling sessions with your new hire. In many companies, the onboarding process is limited to 90 days. According to a study conducted by CareerBuilder, companies without a structured, ongoing onboarding process are seeing a negative impact on the company, effects that include lower productivity, higher inefficiencies, more employee turnover, lower employee morale, and decreased employee engagement.

After the 60-90 day mark, be sure to schedule check-ins in order to talk to your semi-new hires about these four key areas. Here are some questions they might be asking themselves:

- **Basic Needs:** Do I have the tools and support to be successful? Do I know what is expected of me?
- **Cultural Fit:** Do I fit in here? Are my contributions valued and significant?
- **Alignment:** Can I align myself with the beliefs and values of my leaders and this company?
- **Opportunity:** Can I grow and advance in my knowledge, skills and responsibilities?

A fully developed onboarding process — especially for remote employees — can help mitigate against potential disengagement and demonstrates a commitment to a personal progression for each employee that maps key milestones and expectations. Continuous onboarding provides constant threads of reflection and growth opportunities for employees, so that they know their job well and how to progress.

*A robust remote employee onboarding plan can present its own set of unique challenges. However, the return on investment for properly training new remote employees is well worth the effort and saves you from having to quickly and hastily off-board them. So all aboard toward increased retention!*

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Humantelligence is the leading cloud-based platform for the accurate measurement of culture at every level of an organization, from individuals and teams to overall corporate culture. HT has the quickest, most comprehensive self-assessment that measures behaviors, motivators, and work energizers so that leaders have the culture and talent intelligence needed to measure, manage, and hire for fit, optimize collaboration while reducing turnover, and build engaged high-performing teams across the organization.

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