

checklist

onboarding new employees while working remotely.

pre-planning

finalize the offer

- collect key documents and signed forms
 - final signed job offer
 - digital copies of ID
 - payroll enrollment
 - confidentiality or non-compete agreements
- agree on a start date and time

gather information and documents

- create a digital onboarding package
 - employee handbook
 - data privacy policy
 - key contact numbers
 - HR and benefits information
- set up access and logins for your company email, software and intranet

ship hardware such as a laptop, monitor or phone

build a training plan

- create a training calendar for trainers and new employees
- plan content of training sessions with trainers
- prepare training presentations, documents and cheat sheets
- pre-record training videos for straight-forward tasks



the first day

welcome the new employee

- greet the new employee at the start of their first shift via video meeting
- explain the training plan and answer any questions
- schedule a team meeting to put faces to names

prepare activities to reinforce learning

- assign tasks that use skills and processes new employees learned
- ensure colleagues are available to answer questions
- consider setting up group work via video conference
- pair new employees with experienced colleagues for support

ongoing engagement

stay in touch

- use phone, email, chat and video meetings to keep in touch
- set up regular team and 1:1 video chats to check in with new employees
- provide a list of contacts new employees can reach out to with questions
- set up weekly meetings to discuss projects
- organize virtual social gatherings for employees to get to know one another

ask for feedback and evolve

- prepare feedback forms or set up a post-onboarding interview
- encourage new employees to share their ideas and feedback
- act on what you learn quickly and make changes
- use file sharing tools like Google Docs to stay nimble and quickly adapt your training documents based on feedback

Need help developing your remote onboarding process? Our team can provide support with developing a custom remote onboarding process that works for your organization.

