

Virtual Onboarding

Without being able to meet in person, it can be challenging to make your new employees feel like part of the team. Here is how to build a personalized and engaging virtual onboarding experience that will prepare the new hires for success.

1. Have the new employee complete New Hire Paperwork

Consider using an e-signature tool so your new employee can view, edit, and sign tax documents, various contracts, or agreements and other new employee forms from the comfort of their own homes.

2. Create an agenda for the first week

What would you like your new hire to learn and do during their first week? Come up with a schedule for their first week, making sure to build in breaks between video calls and enough check-ins and touch points so they do not feel ignored or overlooked.

3. Email them (new employee) a welcome message

Include relevant information they need to know before their first day, such as when to expect equipment, the agenda for their first day and week, and links to join initial video conferences. You may also want to provide early access to your employee intranet for your new employee to explore prior to day one.

4. Deliver work equipment

Send new hires the technical equipment they need to be successful (e.g. laptop, mouse, keyboard, monitor, headset). If possible, download and install company-specific software and programs before sending any equipment to your new hire's home address. Include initial IT setup instructions to help them get logged onto their computer and work email for the first time.

5. Send a welcome kit

Make your new employee feel valued, appreciated, and part of the team by mailing them a welcome packet that includes your employee handbook, benefits information, and company swag (e.g. sweatpants, notebook, pen).

6. Add the new employee to all relevant communication channels

Working remotely can be isolating, so consider assigning your new hire a go-to person who can meet with them regularly to guide them through the first few weeks or months on the job. A welcome buddy can also introduce your new hire to the right people and share information, tips, and advice to help them settle in and be productive sooner.

7. Get the new employee online as soon as possible

Give your new hire a “tour” of your virtual workspace. Schedule a virtual orientation with a member of your IT team to get your new hire set up with their technology and software (e.g. login credentials, VPN, project management applications). Make this the first meeting of the new hire’s day—especially since their only connection with your team will be through technology.

8. Meet the team

To do this virtually, set up a video introduction with the new hire’s team or department. Have current employees go around and briefly explain what they do, including a fun fact about themselves.

Help your new employee get to know the team in a more casual setting by scheduling virtual team lunches for the first week. You can also set up brief one-on-ones or small group video chats between the new hire and their coworkers to help them understand how they will be working together.

9. Hold company orientation

What do you want new hires to know about your company, team, and culture? Develop a new hire orientation course that covers the following key company information:

- Company history
- Why you do what you do
- Organizational structure
- Mission and values
- Overview of the company’s products and/or services
- HR policies and procedures
- Details about benefits enrolment
- How departments work together

Depending on the size of your company, you may want to loop in several people to help host company orientation, including HR staff, the hiring manager, the new hire’s welcome buddy, heads of different departments, or other relevant team members. Onboarding several people at once? Consider holding a group new hire orientation to save time and let the new employees get to know each other.

10. Go over roles and responsibilities and expectations

Set up virtual job shadowing or job training sessions to help new employees learn their new role or to get a higher-level understanding of what other teams and departments do. Give them a specific number of tasks to complete over the days and weeks following their training, making sure to provide points of contact to set them up for success. Finally, work with them to create goals for their first 30, 60, and 90 days on the job.

11. Collect virtual onboarding feedback

Make your new hires feel valued and heard beyond their first day and week. Send a survey to collect feedback about your virtual onboarding process. (For example, software company ServiceNow collects onboarding feedback from their new hires after one week and again after 45 days on the job.)

Sample Virtual Onboarding Checklist

Before the new employee's first day

- Have the new employee complete new hire paperwork
- Create an agenda for the first week
- Email them a welcome message
- Deliver work equipment
- Send a welcome kit
- Assign a welcome buddy

Day one

- Add new hire to all relevant communication channels
- Inform current team of their arrival
- Get them online as soon as possible
- Meet the team
- Hold company orientation

Week one (and beyond)

- Keep onboarding interactive
- Go over role responsibilities and expectations
- Schedule frequent new employee 1:1s with manager
- Build in spontaneity
- Collect virtual onboarding feedback