

Our guide to

Remote Employee Onboarding

Improve your new hire success rate in the remote working era.



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Onboarding in the Digital Era

For many organizations, onboarding a new hire virtually can be a daunting task. For years, most businesses and people leaders have followed a traditional and accepted model when onboarding new employees through coordinated introductions and connections with new hires face-to-face. There's great value in the human connection, shaking another's hand and sitting down face to face for a formal introduction is familiar and encourages a personal and professional connection.

However, as the traditional working arrangements evolve, some instances may require a business to adapt and shift their onboarding strategies. Although a digital experience may not be a preference for many, some scenarios may demand it. For those unaccustomed to this approach, they often see remote onboarding as an obstacle, a foreign process, however, nothing could be further from the truth.

A digital and modern approach to onboarding does not need to be another hurdle that an employer needs to jump over; with a well-structured plan, any business can quickly equip themselves to shift their hiring and onboarding process online and maintain a sense of professionalism and, most importantly, that connection to employees that the traditional models provide.

The Four Pillars of Successful Onboarding

In 2020, in the face of a global pandemic, it quickly became apparent to many businesses that to operate in these new and challenging conditions, they would need to adapt and adjust their onboarding processes to suit the new reality of the remote workforce. Despite the many challenges, people leaders have, for the most part, come to recognize how critical a thorough onboarding experience is towards ensuring both short and long term success for both the organization and new hires. A study conducted by The Brandon Hall Group found that a good employee onboarding experience can improve employee retention by 82% and boost productivity in the workplace by over 70%^[1].

It stands to reason that the positive results found in this study should also hold true whether the onboarding was entirely digital, or conducted in-person. However, what the succeeding businesses in remotely onboarding new hires had in common during this time, was no secret. In fact, successfully onboarding a new hire virtually shares the same fundamental principles as if the onboarding process was conducted entirely in person.

To succeed in this transition, one must have a clear and concise plan, effective and constant communication, enable positive working relations between an employee, new co-workers, and

A good onboarding experience has shown to improve employee retention by

82%

88%

of employees believe their organization could improve onboarding

manager, and provide resources to people leaders to better this transitional experience. The success of this process, whether in the office or working remotely, is dependent on one's ability to properly execute and modify these key elements of the hiring process so they can be conducted with the same high standards through a computer screen.

When considering the value of the onboarding experience, a recent Gallop poll indicated that only 12% of employees strongly agree that their organization does a great job of onboarding new hires, meaning 88% of employees can see there's room for improvement^[ii]. Studies have shown that a good onboarding experience can result in higher levels of productivity and employee retention, yet so many still fail to see the importance of this transitional experience, or perhaps, simply aren't sure how to move forward and improve.

For new small and medium-sized businesses (SMB's), navigating the onboarding process for a new hire may seem challenging, with the additional aspect of onboarding digitally somewhat overwhelming. However, it need not be. Whether hiring for an 'in-office' position by way of traditional means, or for an individual working from home, the philosophies are very much the same. In either case, as a leader, it is your mission to ensure new hires acclimate to their new work environment, familiarize themselves with the organizations' culture, feel welcomed by their new team, are confident in learning the basics of their new role and are prepared for their first day and the days, months and hopefully years that follow.

Onboarding miles away or face-to-face, a proper well-structured employee onboarding strategy is imperative for a good employee experience, and the first step to closing the gap between an organization and a remote hire.



Developing a Plan

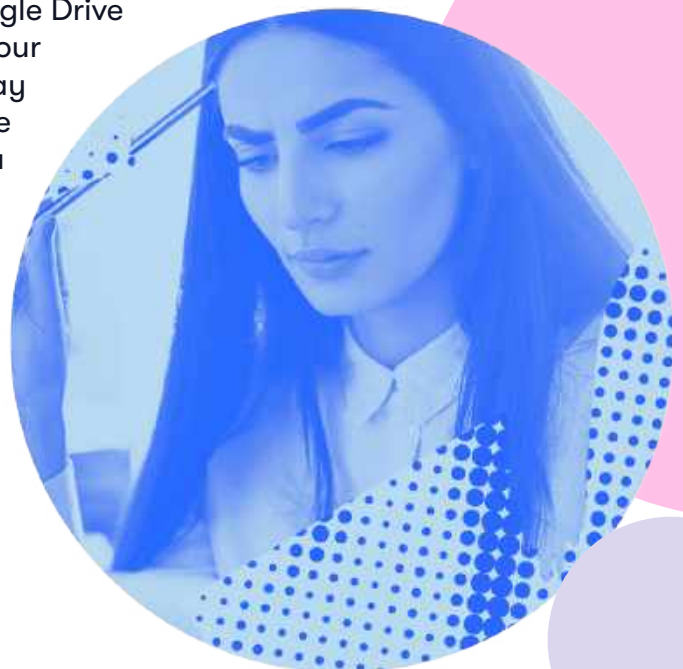
Most SMB's have developed a strategy for onboarding new employees; however, unfortunately, these plans often fall to a 'play it by ear' attitude and are subject to a variance of approach and rigour from leader to leader. Studies have shown that where employers ensure that the first 90 days of a new hire's employment are focused, organized and sustained beyond the early few days and weeks, there is a direct and measurable correlation to a new hire's engagement, work-effort, and overall satisfaction^[iii].

Yet, most organizations usually conclude their onboarding programs after only one week of training. This is an inefficient and unproductive approach with potential adverse consequences. First and foremost, when considering a plan of action, the primary indicator of a successful onboarding process is that it can last throughout the initial 90-day period.

By no means does this suggest that a new employee needs to be coddled throughout their transitional period, rather they are provided with the proper tools, resources, and support, introduced at the right time, to succeed during their transition. It is this methodical approach that lays the groundwork for an effective, productive, and motivated employee.

For a remote employee, and for the more traditional employer, this could initially mean the simple effort of digitizing all new-hire paperwork and employee handbooks, allowing for signatures to be collected electronically and a copy of the handbook that an employee, remote or not, can reference whenever they please. Furthermore, creating an online task calendar can also help establish short and long-term goals for new hires and ensure that the lines of communication between manager and employee are open, allowing for discussion on a regular and systematic basis.

Moreover, the bulk of creating an effective onboarding plan requires a leader to adapt, allowing for a new hire to operate with the same level of effectiveness at home as if they were in the office; for instance, setting up 'Zoom' accounts for a face-to-face meeting or creating Google Drive accounts to access files with ease. No matter what your process may look like, by creating a structured 90-day onboarding strategy and supporting plan that can be implemented for both remote and in-office hires, as a manager, you will have successfully taken the first step towards a more seamless and rewarding onboarding experience.



Communication

From business to business, every onboarding strategy varies, but no matter what techniques or systems an organization may have in place for a new hire, an emphasis on good communication is paramount. A robust onboarding program is an essential step to a better remote and traditional hiring process. However, effective internal communication is the backbone of any good strategy.

Without a proper and effective communication channel between a manager, the new employee and other team members, the excitement and enthusiasm of transitioning into a new job are unfortunately often short-lived if not lost altogether. Once hired, 65% of all new employees have already begun hunting for a new position within only the first three months of starting^[iv].

As a leader, it's your job to bring your company to life and motivate your new team members. If you believe your organization is more than just another logo and just 'another job,' there is no better time or opportunity to showcase the hive of innovation that your company is than the first 90 days.

In a perfect world, a new hire would have a clear and concise concept of your organization's inner workings, your overarching vision, the values that your company stands for, and what sets it apart. This is in contrast to new recruits who may without the benefit of receiving sustained communication and messaging, otherwise be limited to a view of the organization based solely on what you manufacture or the solutions you provide. Instilling what your company truly stands for and who you are as an organization early is critical for new hires.

Clearly communicating who you are as a company sets a standard for what's expected and allows new employees to integrate into the broader company properly; it can also create a sense of belonging and pride. These are powerful messages to get across, and for a remote worker, a manager will need to take that extra step to ensure they are ingrained in a new employee. A great first step in the right direction is to utilize online internal communication software and emblazon your internal branding across the platform.

While many tools are available, utilizing your organization's intranet effectively reinforces your brand and serves as a powerful tool for communication between recruits and team members, especially when working remotely. An internal communication platform can also be equipped with personal bios for every staff member and allow for introductions while displaying individual faces to give identity to each team member, as well as alleviate any awkward future online or face-to-face interactions. Platforms such as Slack, Google Hangouts, Troop Messenger, and more, serve as great online internal communicators that can facilitate a team mentality and allow for secure, quick communication between co-workers.

65%

of employees search for new employment within the first three weeks of a new job due to poor onboarding

An internal communication system, especially for a new remote employee, can help ensure the effectiveness of your onboarding process and smooth transitioning, assisting new hires to become high-performing employees faster.

Tools for your Organization

Finding the right software tools to fit your unique business needs can be difficult with so many options available in today's marketplace. However, when working remotely, prudence suggests that organizations consider constructing a well-rounded toolkit to enable individuals and teams to function effectively, and to the same degree as if they were in an office setting. As a first step, it's important to define and then start with the essentials of what will allow your business to operate smoothly and successfully.

The chart below (fig.1) displays various software that can aid you and your business when tackling everyday tasks remotely and are grouped into four primary categories: Team Communication, Videoconferencing, Task Management, and finally, Onboarding. As previously mentioned, communication is essential to any business. Whether communicating with clients, fellow co-workers, or new employees, it's necessary to establish a reliable team communicator and an effective video conferencing platform.

A key advantage to a team communication platform is the enablement of efficient and unlike the asynchronous realities of email, real-time messaging between employees. When working remotely, effortless communication is a top priority. For a remote employee, the ability to effortlessly reach out to another team member promotes constant communication and strengthens connections; something valued as part of a traditional in-person office environment. Moreover, the easier it is for remote employees to connect has both a positive effect on a healthy remote office interpersonal dynamic and promotes a more enjoyable remote working environment.

With that said, while team communication platforms are great for in-house working discussions and meetings, organizations also benefit from being equipped with a platform dedicated to videoconferencing for many other critical aspects of the business. Whether speaking to clients, vendors, shareholders, business partners, tenured employees, or onboarding a new hire, a face-to-face videoconferencing platform aids not only the quality and efficiency of communication, however also assists in establishing and furthering critical business connections with a more human quality.

To further promote communication, productivity, and transparency, a Task Management tool can also be of great use to both established team members, as well as new hires. Some key benefits of a task management tool include, but are not limited to, keeping track of an employee's daily, weekly, and monthly administrative and or client-related tasks, tracking progress, deadlines and checking tasks off the list when complete. This type of tool is an excellent form of non-verbal communication that can boost productivity in the workplace as it provides a roadmap of required 'to-do's' so nothing critical gets lost or omitted as the number of tasks grow. To a new hire, this can be particularly helpful, especially in the early stages of their employment journey, as they visualize and plan new tasks when first getting started.

As further emphasis, and in particular, as it pertains to successfully hiring a new employee remotely, it is essential that organizations consider the value of a robust, easy-to-use onboarding software that can also handle the many intricacies of an HIRS system. At Collage, we pride ourselves on just that. From onboarding to performance reviews, time-off tracking, digitizing company documents, and much more, we have a dedicated platform to handle the inner working of Human Resource tasks and functions, so you don't have to, and when paired with the additional software aids listed above, your remote work toolkit will be fully stocked.

Category	Software	Capabilites
Communication	Slack	<ul style="list-style-type: none"> • Direct messaging • Centralized 'channels' for focused conversations • File sharing • Voice and video calls • Connect to other apps (i.e. Google Drive)
	Microsoft Teams	<ul style="list-style-type: none"> • Direct and group messaging • Video conference calling • Screen share capable • Access, share and edit Word docs, Powerpoint, and Excel files.
Videoconferencing	Zoom	<ul style="list-style-type: none"> • Video conference calls • Host video webinars • Create conference rooms • Integrated messaging and file sharing • Join video conferences by phone
	Google Hangouts	<ul style="list-style-type: none"> • Video conference calls • Online meeting up to 100 people for up to an hour per meeting
Task Management	Monday.com	<ul style="list-style-type: none"> • Centralized team and project management • Visualize assigned, in-progress, and complete tasks • Software development, local code development and more
	Asana	<ul style="list-style-type: none"> • Centralized team and project management • Visualize assigned, in-progress, and complete tasks • Visualize and manage team workload • Over 100 possible integrations
Employee Onboarding	Collage HR	<ul style="list-style-type: none"> • Employee directory and self serve • Org charts • Custom reports • Digitalize company documents and signatures • Time off tracking • Performance reviews + surveys • Applicant tracking • A dedicated account manager

fig. 1

Community and Connection

During the first days and months of the pandemic, businesses scrambled to adapt to their new remote working environments quickly; standard working protocols changed by the day, and as one could imagine, taking on a new employee during this time had become quite the challenge. As mentioned, in this setting, to succeed, effective communication had never been so essential. However, the path to a successful onboarding experience does not stop there.

Communication, while a critical element to success, is only the first step towards the goal of facilitating a healthy connection between a new hire, other employees, and a leader; relationships made to instill a sense of community and an overall team mentality. While some have been unsure of how to operate effectively during Covid-19, observations indicate that those organizations that employed a consistent and transparent communication strategy with employees showed strong leadership, responsiveness, and a commitment to their employees' success during these stressful times, remained stable and in some cases have excelled from an employee perception and commitment standpoint.

Furthermore, it is important to note that as a manager, practicing compassionate communication during times of stress builds trust and aids in creating a stronger working relationship. As a people leader, it's essential always to be communicating with new hires and find ways to connect and build those strong relationships, and while working remotely can present challenges, it's far from impossible.

By utilizing the aforementioned internal communication programs, leaders should consider establishing weekly virtual 'check-ins' with new employees. These meetings can allow one to see what's working for a new hire, and what could be improved during the training process. These can be short meetings conducted once or twice a week, however no matter the frequency or duration, when onboarding a new employee, setting aside a time and creating a one-on-one space with a new hire and their direct manager can be very beneficial to both parties as it pertains to supporting the sense of belonging and community.

With that said, new colleagues also require time for their individual concerns, questions, and general inquiries, noting that 72% of employees considered this private time with a manager the most critical aspect of any onboarding process^[v]. This time allows for clear communication of a managers' expectations and is a time when both a manager and employee can provide constructive feedback to better the overall hiring experience.

When considering the employer-employee connection, meetings between manager and employee can prove to be a great tool aiding in the construction of a more reliable connection and working relationship. As a manager, in addition to your working relationship, you can also help ensure that a similar connection is established between a new remote hire and other employees.

Before the pandemic, connections between employees could typically be facilitated quite naturally in an office setting, as meeting new people and expanding one's network was only a

handshake away. Now, however, as we've transitioned to working remotely, it's become increasingly difficult for new hires to meet their now co-workers let alone properly connect. An increased responsibility to create such opportunities for new employees to meet others within the organization has now fallen on managers and leaders.

Creating and enabling such opportunities, however, is much simpler than it may seem. An excellent method to first introduce a new hire is to coordinate weekly group events. Not only will group events allow for organic connections between all co-workers, but it will also promote team building and help improve working relations between employees.

Another great technique that has been shown to help further integrate new hires into the broader team is implementing a buddy system during the onboarding process. This system has been proven to be highly effective; the HCI (Human Capital Institute) reporting that 87% of organizations that implement a buddy system demonstrate an effective way to speed up new hire proficiency^[vi]. By matching a new hire with a well-seasoned employee and requesting they check-in once a week for the first month, and once or twice a month afterwards, one can effectively help ensure a new employee acclimates to their new working environment.

This 'buddy' tactic is free, effective, and simple, yet only 47% of organizations implement a buddy program during the onboarding process. By taking that extra step for you newer employees and joining that 63% of organizations that utilize a simple buddy/mentor program, as a leader you can feel confident that not only are you doing you best to ensure the success of a new hire, but your fellow teammates have your back and are there to provide a helping hand.

87%

of organizations that implement a buddy system see an increase in new hire proficiency



Manager Support

Whether an employee is working remotely or is physically in the office during the onboarding process, this transition can be quite stressful for any leader. There are many moving parts and aspects of this process that require attention, time, and commitment to ensure a new employee's success. Hiring virtually can be extremely daunting, as it is somewhat new to most, and no manager should feel alone in this process.

Support and guidance for people leaders will be critical to ensure a smooth onboarding process. Given that Managers are in the best position to orient employees to their new workplace and bring life to the information they deliver, proper management training will play a critical role. Like their employees, they too require tools and resources to help them better manage their time and ensure a new hire receives the right training and preparation for their new role.

When considering management training, and with the understanding that employee onboarding is a process and not a one-time event, a well-stocked manager toolkit, can play an essential role in ensuring the manager is equipped with the information they require to provide an effective transition for a new candidate. At a minimum, this toolkit should be furnished with all essential or 'standard' onboarding documentation such as forms and supporting education to assist with setting up the employee on payroll and an available benefits program, outlining options for participation in retirement, pension and or other incentive plans. It should also include an introduction to support resources such as employee assistance programs and other health and wellness related tools and resources.

This toolkit may also include general company information, including vision, mission, or forward-looking statements. Finally, it should support the organization's culture, philosophy and management approach that could take the form of a variety of communication pieces.

The above is not an exhaustive list, however when supported by a clear process and supported by the four pillars of success, these steps to onboarding in a remote era as outlined herein create a useful tool and resource for managers to lean on and reference. Moreover, a thoughtful onboarding process, underpinned by a well-documented plan, timely and effectively supporting communication, tools and resources, an emphasis on community and people connections, with the execution of the above supported by clear tools and manager supports, any SMB can ensure that its organization is well-positioned for sustained success driven by a highly engaged employee population.



Citations

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