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16 Tips to Quickly and Efficiently Onboard Employees Remotely

How to Quickly and Remotely Onboard Employees Post-Pandemic

Quickly and remotely onboarding employees is imperative for HR professionals, hiring managers, and business owners alike. Onboarding done right brings new hires up to speed quickly.

- Paperwork completed
- Rules learned
- Introductions made

- Teams built
- Job details transferred
- Productivity achieved

While 95% of professionals say their company has an onboarding process, 59% reported that they experienced a mishap when starting a position, according to a Robert Half survey. Clearly, quality must also be part of the success formula.

Onboarding Successfully is More Important—and More Achievable—Than Ever

Onboarding may never be the same—and that's good. New onboarding practices that are location independent provide a reliable path to success for everyone.

- Faster time to productivity
- Maximum employee engagement
- Greater sense of commitment and teamwork

- Higher rates of employee retention
- Cost savings

Chances are some on your onboarding team will be remote throughout the process. Executives, hiring managers, IT, HR, teammates and new hires may never be in the same room. And that's ok. In fact, remote onboarding processes will likely rival in-person onboarding because they are more flexible, engaging and measured than those that rely on in-person interactions.

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Onboarding Best Practices are Applied Differently in a Remote Environment

The basics of onboarding don't change. How you manage the process might:

- Plan - organized and proactive with frequent virtual check-ins

- Introductions - virtually connect new hire with team and broader workforce

- Paperwork - gather tax forms, contact details, direct deposit, benefits eligibility, certifications and licensing such as CDL

- Questions - make it easy to ask questions via virtual channels

- Shadowing - use video conferencing, webcam or other means for live but not necessarily in-person on-the-job training

- Team building - offer formal and informal ways to build rapport and common cause

- Office equipment and software - procure and set up equipment from afar

- Meeting participation - set up accounts, calendars, video conferencing

- Face-to-face - meet regularly but not necessarily in person

Here are 16 tips for quickly and remotely onboarding employees.

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01 Start the Conversation Early

The first phase of onboarding begins as soon as the new hire accepts the offer. No need to wait until Day 1. Get started by sending a welcome letter. Use the time between when a new hire accepts the job offer and their first day on the job. Keep the excitement going and build rapport. This doesn't take a lot of time, but it has a big payoff.

02 Go Paperless with the Paperwork Before Day 1

If your new hire is available, let them start the paperwork. Make sure your paperwork is actually paperless, so new hires can access it online. Most new hires will find this very helpful.

Online onboarding:

- Gives new hires the flexibility of time to get it done

- Allows new hires pull together details as they can

- Gives you immediate access to the paperwork even if you are remote

- Makes the paperwork more snackable and less overwhelming

- Prevents misfiling and lost documents

- Initiates a WOTC interview if applicable

- Gathers tax, licensing, payroll details, contact details, direct deposit and more

- Presents confidentiality, non-disclosure and other agreements as needed

- Collects electronic signature

- Moves the focus onto team building for the first day on the job

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03 Get the Logistics Right, From the Get Go

Start your new employee off in the environment where they will be working. The setup will be different if they work from home, at a central office, or on the road. Be prepared ahead of Day 1 to give them the specific tools they need to thrive in their particular situation.

Order furniture, supplies and technology early. This could include:

- Desk or workspace

- Locker

- Personal protective equipment (PPE) such as masks, gloves and scrubs

- Uniform

- Phone

- Printer

- Laptop/PC

- Monitor

- Wi-Fi

- Email

- Collaboration tools like Slack, Teams, Asana

- Microsoft 365

- CRM

- ERP

- Cloud storage

- Job specific software

Understand the logistics. Have people ready to set up and support using remote tools or in office. They can help with logins, email setup, Microsoft 365 setup and access to various software systems.

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04 Set Up Time Tracking

Make sure you have a system in place to track time starting with their first day on the job. Every employee should have a formal method of reporting their time. Your business needs it to comply with ACA, FMLA, FLSA, and a host of other federal and local laws. Your managers need it to ensure they meet labor budgets, while employees and contractors need it to confirm that they are paid properly.

Here are some key capabilities your time tracking system should include:

- Time clock - make it easy to clock in and out using a physical clock, online clock or phone-based app

- Geolocation - automatically record the location of clock activity to ensure that employees are where they should be when working

- Department - assign time to a department automatically or allow employees to select if they split work between departments

- Job type - similarly, assign or allow employees to select if they switch between jobs

- Breaks/meals - prompt employees to take breaks based on governing rules

- Project - prompt employees to select the job or project worked

- Mileage - collect mileage or other important details during clock in/out

Time tracking is critically important to cash flow and job costing. **WorkforceHub** is a good example of the many solutions available. WorkforceHub has an easy-to-use phone-based app and it also integrates with hardware clocks.

Start tracking time on Day 1, giving everyone confidence that onboarding is underway. As soon as the new hire is contributing to a job or project, the hours can be assigned to that activity.

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05 Start Scheduling from Day 1

With employees spread between locations, departments, shifts, and projects, it is really important to publish schedules as early as possible. Add new hires to the schedule on their first day of work, and give them access to the schedule as far in advance as possible.

Employee scheduling is important for ensuring proper shift coverage. It is critical to compliance with licensing and certification regulations. Strategic scheduling can prevent unplanned overtime and compliance issues. Make sure you have an easy way to let employees pick up and drop shifts in accordance with compliance rules, so that you minimize situations where you have to scramble to cover a shift.

Employee scheduling software is invaluable in protecting employee safety, health and productivity. Multi-shift, multi-location schedules are the new norm, and software like **WorkforceHub** can ease the burden of building and adhering to them. You can publish schedules online and employees can see their assigned shifts right away. Make it easy on yourself and on them.

Combine employee scheduling with timekeeping and you can enforce schedules. **WorkforceHub**, for example, supports both timekeeping and employee scheduling. When used together, you can prevent early clock in and enforce breaks.

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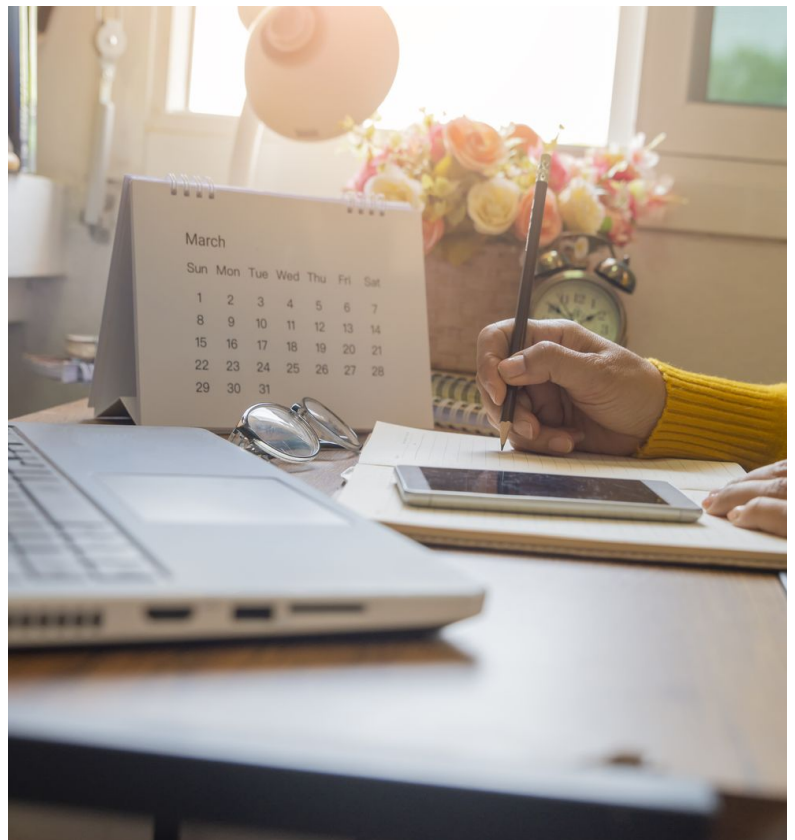
06 Set an Onboarding Timetable

There is a lot of ground to cover with onboarding. There is paperwork galore. There is required reading. And there is a fair amount of work to get the new hire connected to the rest of the team.

Create your onboarding timetable by dividing it into stages. For example:

- Stage 1 (Pre-Day 1): Logistics and paperwork (licenses, certifications, tax documents, etc.)

- Stage 2 (Day 1): Introductions and orientation

- Stage 3: (Week 1) New hire up and running in their environment, connected to team, assigned small project

- Stage 4 (Month 1): Hiring manager sets goals, weekly HR check-ins/feedback

- Ongoing measurement

Try to measure progress against goals from the perspective of:

- Employee

- Company

- Manager

- End Customer

For example, an employee goal may be to achieve a certain customer satisfaction score, while the end customer goal may be to have a great experience when interacting with the employee. Keeping these perspectives in mind can help you measure actual job performance.

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07 Anticipate (and Proactively Answer) Questions

There are certain details that every employee wants to know. Why not provide that information up front? This shows your interest in the employee and gets these questions out of the way.

Here are some common new hire questions:

- Schedule: what is it, and how can I request changes?

- Hours: is there flexibility?

- Vacation/sick policy: how do I request time off and how much do I get?

- Rules: what are the boundaries?

- Safety processes: are there safety processes I need to know about now?

- Timekeeping: how do I report the time I work?

- ID/Badge: do I have an employee ID or badge?

- Equipment: what technology do I need for my job and how do I get it?

- IT support numbers: who can help me if I have technology questions? How do I submit a support ticket?

- Key contacts: who do I turn to if I need help?

Brainstorm what new hires might not know and might not know to ask. Survey existing employees to find out which questions they had during onboarding and then prepare the answers.

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Show the New Hire Around the Organization, the Building(s), the Mission

Remote onboarding doesn't mean that orientation is out the window. Day 1 is a great day to learn more about the employee and introduce them to the company they have joined.

Make your orientation less about place and more about people. After all, people are what make the company a success. Remember that the first few hours can have a heavy impact so use them wisely.

Take the time to explain how the new hire fits into the organization and culture. Describe overall goals, team goals and how the new hire can make an impact. Provide relevant company history and culture, with an emphasis on individual and team success. Let them express themselves. Studies show that performance and retention are higher when individuals have an opportunity for self-expression.

09

Get Their Face Out

Connect new hires with the company as quickly as possible. Just like on social media, faces matter. Make sure that the new hire has a photo on all shared applications like Outlook, Teams, Slack, and Asana. This will help form a social connection.

Add their profile photo to the company directory and publish a new hire spotlight. Ask the new hire to write their own summary for the spotlight, giving them specific guidelines. The summary should include a notable tidbit —for example, a paragraph about a favorite pastime. Include this in an email to the company and on your company news site such as your HRMS.

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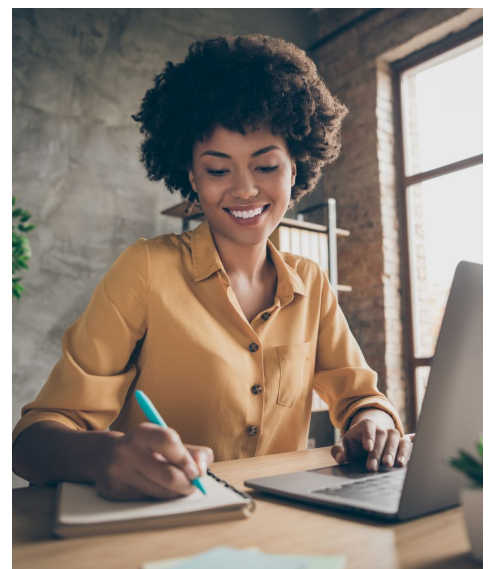
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Be Clear About Rules, Expectations, Policies and Procedures

Successful onboarding depends on clarity. Be clear on the ground rules. Emphasize people and processes. Define projects, workflow, priorities and expectations. This may seem obvious, but companies struggle to do this well. Take the time to document so that your messages are consistent and complete. If you haven't already, use the next onboarding as an opportunity to capture and codify key information from subject matter experts.

11

Make Documentation Easy to Access and Explore

Onboarding usually requires some reading to come up to speed. So does keeping up with the company. Make it easy for new hires, and everyone else, to receive and consume information.

- Company news, video updates, team insights

- Company handbook, code of conduct

- Lists of resources

- FAQs

- Announcements

- Knowledgebase of policies, resources

- Project libraries (Google Drive, SharePoint, OneDrive)

You can use your HRMS for many of these documents. WorkforceHub, for example, makes it easy for you to post announcements, events, handbooks, policies and other valuable information and notify employees that it is available for review. Doing this helps new hires quickly come up to speed and stay current.

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12 Make Training Interesting, Progressive and Measured

Over the course of time new hires will likely receive a fair amount of training. When this is in person, it can be lively and interesting. When it is remote, you risk boredom. So change it up.

Present company training and individual job training in a variety of ways. Here are some possibilities:

- Video conferencing (like Zoom) with a speaker and slides

- SlideShare with narration or annotation

- Stand-ups for quick team and/or company status check

- Videos demonstrating factory equipment, showing work processes, following a product down the line, discussing product development and testing, and so on

- Live walkabouts taking new hire through the building and offices

- Q&A sessions

- Lunch and learn

- Coffee break

- Role reversal, where the student teaches the master

Be sure to measure the results of training in the moment and over time.

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13 Make the New Hire Feel Like Part of the Team

Work to connect your new hire to the team. Here are some ideas:

- Introduce teammates

- Give the new hire a way to make an early contribution

- Set up communication links within the team

- Foster interest in the individual

- Describe the tie between your company and why the new employee was hired

- Set up meetups

- Make intro videos

- Host a lunch and learn

- Perform daily check-ins, feedback, Q&A until the new hire is integrated

- Ask teammates why they like the company

- Set up a favorite beverages club (coffee clutch)

- Team building games

Many new employees have a hard time meeting others in the company. Help them along.

14 Hold Regular Stand-ups

This idea is good for everyone, regardless of how new to the team. Quick meetings (that's why they're called stand-ups) provide an update on individual projects and potential roadblocks. The best stand-ups generate new ideas and spur creativity while improving transparency and teamwork.

Some people may stay quiet at first. Stand-ups can help ensure new hires are part of the conversation without putting them on the spot.

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15 Be Deliberate

How you conduct new hire onboarding makes a big difference in how quickly new hires become effective at their jobs. Remote onboarding requires your process to be less ad hoc and more proactive.

Companies are now a network of people and places. Your company's future may well depend on your ability to quickly and remotely onboard new hires. You can do it by building on your past processes and freeing them from dependency on location.

16 Leverage Technology to Free Your Organization from the Bonds of Location

The span and scope of affordable communications technology available today is truly breathtaking. Virtually everyone in the workforce has a mobile device and internet access. Email, social media, messaging, chat, video and live streaming are commonplace. Collaboration tools, project management, CRM, ERP, video conferencing and mass storage are all widely available to teams.

Human Resource Management Systems (HRMS) provide great support for quickly and remotely onboarding new hires. Using a small business HRMS like WorkforceHub makes it easy for remote HR personnel to add new employees and initiate paperless onboarding. New hires step through an online process that gathers tax forms, contact information and all the other details needed.

You can also use the HRMS to publish documents like an updated employee handbook and require electronic signature from employees. Company news, suggestion box, check-ins and other HR touchpoints make HRMS a vital component of your enabling technology.

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