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Ebook

The Definitive Virtual Onboarding Guide
for Distributed Teams

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Welcome to the new world of onboarding anywhere

We've all had one of those nerve-jangling first-day experiences. You leave home with an extra hour to allow time for traffic, public transportation delays, or possible zombie attacks. You show up at your new office bright and early, only to discover that no one was expecting you. You have no workstation or schedule for the day. Talk about a letdown!

Those nightmare first days in an unfamiliar office may be a relic of the past for many employees. Two-thirds of US workers say they'd like to continue working remotely even after the pandemic ends. But the importance of onboarding isn't going away even as distributed teams become the norm.

A new hire's early experience sets the tone for the rest of their tenure with a company. Employees who have a negative onboarding experience are twice as likely to look for other career opportunities in the future. But a positive onboarding experience can increase new hire retention by 82% and productivity by over 70%.

Onboarding distributed employees brings its own set of challenges. The lack of in-personinteraction means you need to be especially thoughtful about certain goals like creating connections and introducing your company culture.

Executive Summary

A comprehensive onboarding experience for your new hires is non-negotiable. The more time and intention you put into onboarding, the faster your new hires become engaged and productive. **Keep these points top of mind when adapting onboarding for remote employees:**

Distributed new hires may quickly feel isolated and burnt out if you don't help them forge social connections and encourage taking time to unplug.

The best onboarding helps new hires build social connections and acclimate to your company culture.

Optimize time to productivity for your technical employees by creating clear documentation and assigning tasks that quickly bolster confidence.

A positive onboarding experience can increase new hire retention by 82% and productivity by over 70%.

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Get comfortable with remote onboarding

If you want to build a successful remote onboarding program, you'll need to be intentional about every detail. How do you build relationships? How do you give new hires a proper introduction to your company and team culture? And how do you make their first few days engaging – and maybe even fun?

Remote onboarding means no office tours, team lunches, or coffee breaks (at least in the traditional, in-person sense). It won't always make sense to simply take your traditional onboarding sessions and turn them into video calls either. But it's not an excuse for dropping social activities from the agenda and hoping your new hire will figure everything out on their own.

Here are a few points to keep in mind when shifting from in-person to virtual onboarding:

Put information at employees' fingertips: Empower employees to be self-reliant whenever possible. Create a central hub where you document frequently asked questions, contact details for key departments like HR and IT, and other information new hires are likely to seek out.

Many distributed-only companies like Zapier and GitLab stress the importance of helping employees build the habit of knowing where and how to find key information themselves.

Resist the urge to over-index on video meetings: Video will often be your go-to substitute for in-person meetings. But scheduling video meetings all day, every day is a quick way to overwhelm and exhaust your new hires.

Avoid Zoom fatigue by scheduling breaks, holding some conversations over Slack or email, and allowing time for new hires to research and learn on their own.

Strive for short, frequent check-ins: In a remote setting, it's better to aim for more frequent, shorter bursts of communication. You never want a new hire to go for too long without the opportunity to ask a question, raise a concern, or share feedback.

Create interactive moments: Many onboarding programs feature informational sessions where you introduce new hires to your company history, values, and organizational structure.

Build variety and interactivity into these sessions whenever you can. Studies show that interactive activities are six times more likely than videos or text to help people learn and retain information.

Lean into the power of peers: Assigning an onboarding buddy — someone who's not the new hire's manager who can help answer early questions — is even more important in a remote setting. When assigning buddies, decide what makes the most sense for your company. You might choose someone from a different team or department to help your new hire build crossdepartmental connections.

Encourage buddies to check in frequently and schedule several check-ins throughout the first week. Microsoft found that the more a new hire met with their buddy during the first 90 days, the more likely they were to say the buddy helped them quickly become productive in their role.

Capitalize on the strengths of remote onboarding: You can create more accessible and scalable content with on-demand videos and other learning materials. A platform like Udemy Business, for example, allows you to create customized courses that are only available to your employees.

You can easily segment material by region, department, or role type. Plus, employees across time zones can engage in learning whenever it's convenient. Learners can also pause, take notes, and rewatch this type of pre-recorded video content.

Organizations with a standard onboarding process see 50% greater new-hire productivity than those without a standard onboarding experience.

Gather feedback to supercharge your onboarding programs

<u>Feedback fuels better onboarding</u>. Make sure new hires and hiring managers have the opportunity to share their observations and suggestions for how to improve the onboarding experience.

There may be gaps or areas where you're falling short — especially if virtual onboarding is new for you and your organization. A post-onboarding survey, for example, allows your new employees to rate their experience and make suggestions for improvement.

People and team managers can take it a step further. Stef Miller, Director of Demand Generation at Udemy Business, recommends creating a more formal one-to-one process between the manager and an employee. She shares a document with all new hires where they can jot down their feedback. About two weeks into a new hire's tenure, they'll go through the document and discuss what they've observed.

Find a communication style that works for you and your new hires

Communication was one of the top skills according to Udemy's <u>2021 Workplace Learning Trends Report</u>. And it takes on greater importance in a remote setting.

Ask about your employees' preferred work and communication style (and share your own). For example, they may like to have dedicated work blocks when they'd rather not have meetings scheduled. They might have caretaking or other duties that mean they'll be offline at certain points during the day. Or they may have personal preferences about the default mode of communication.

When you establish team norms around work style, you foster a sense of belonging and psychological safety on your team, says <u>Shelley Osborne</u>, VP of Learning at Udemy. This is critical for creating an environment where employees feel like it's okay to genuinely be themselves.

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Master the essentials
of new hire onboarding

New hire onboarding – whether it's in-person or virtual – is much more than signing contracts, filling out paperwork, and setting up email accounts.

Your onboarding program needs to set employees up for long-lasting success. Adding structure to your program can help. New employees who went through a structured onboarding program were 58% more likely to be with the organization after three years.

Use this checklist to provide your employees with a sense of belonging, set clear expectations, and immerse them in your company culture when it matters most.

☐ **Welcome your new hire to the team.** Send an email as soon as you can after they've accepted the offer and encourage other teammates to do the same. This will quickly establish a sense of social acceptance, which is <u>linked to newcomer success</u>.

☐ **Set up tools and equipment as soon as possible.** Work with your IT team to make sure new hires have everything they need well before their first official day. Offer training or tutorials to help get new hires up to speed on the tools your team uses to communicate and collaborate.

☐ **Make their first day memorable.** There are countless ways you can welcome new hires even if you can't meet them in person. Send them a virtual greeting card. Invite them to give a tour of their home office space and introduce their "coworkers" (whether it's their children, pets, or even a favorite houseplant). Encourage other teammates to do the same. Include time for casual conversation or icebreaker activities in your team meeting so there's a chance for everyone to get to know each other on a personal level.

☐ **Discuss responsibilities and expectations.** The <u>top reasons for failure</u> in a new role are a poor grasp of how the organization works and a misfit with organizational culture. Make sure that you set clear goals and learning objectives for a new hire's first 30, 60, and 90 days. Take time to talk through unique aspects of your company culture and norms. Are there specific guidelines for giving feedback? Are they expected to <u>participate in regular learning and professional development</u> sessions?

☐ **Consider the unique circumstances of working remotely.** Share expectations for working hours and communication. Is there a daily standup? Core working hours? How do team members keep everyone informed on what they're doing? Let your new hire know how often they should check in. Be sure to offer recommendations about unplugging to avoid burnout. And don't just provide this information verbally — put it in writing so they can reference it later.

For an even more comprehensive guide to help you plan out your new hire onboarding, check out our <u>11 Steps to Onboarding New Employees Remotely checklist</u> and share it with others.

Help new hires acclimate to your team and company culture

The topic of a workplace's culture makes up an average of just 30% of onboarding programs even though struggles with culture are a big reason why many new employees fail. In an office setting, new hires might be able to absorb culture more naturally. But it takes extra effort in a virtual setting. **Here are a few ideas to consider:**

Document everything! Fully distributed companies like Zapier and GitLab stress the importance of having a well-maintained handbook that acts as the go-to for getting all questions answered.

Make sure leaders set a good example of culture-specific behaviors. At Udemy, leaders reinforce the learning culture by setting aside time for learning and regularly sharing courses they're taking on Slack.

Speaking of leaders, make sure your CEO and other executives participate in frequent company-wide check-ins like "Ask Me Anything" sessions or fireside chats. Try to rotate through each time zone where your employees are located so everyone has at least some chances to watch the sessions live.

New employees who experience a structured onboarding program are **58%** more likely to be with the company after three years.

Take advantage of technology to scale your onboarding content

Online courses can help you scale your onboarding program. Your global employees can access course content when and where it's convenient instead of being bound to the head office's schedule. Udemy's Lead Learning Designer, Audrey Espey, shares four points to keep in mind when designing an online course:

1. **Structure your material into lessons and chapters to make it easy to navigate and consume.**

2. **Make the content practical so new hires can quickly apply what they've learned.**

3. **Make sure you have a clear purpose for creating online content (hello, remote onboarding!).**

4. **Identify your target audience and their goals and objectives.**

If your organization offers Udemy Business, organize your custom courses into Learning Paths that guide new hires through various onboarding journeys. For example, new hires at Udemy Business complete an Onboarding Learning Path that includes courses on the company's history as well as links to things like how to request technical support from the IT team.

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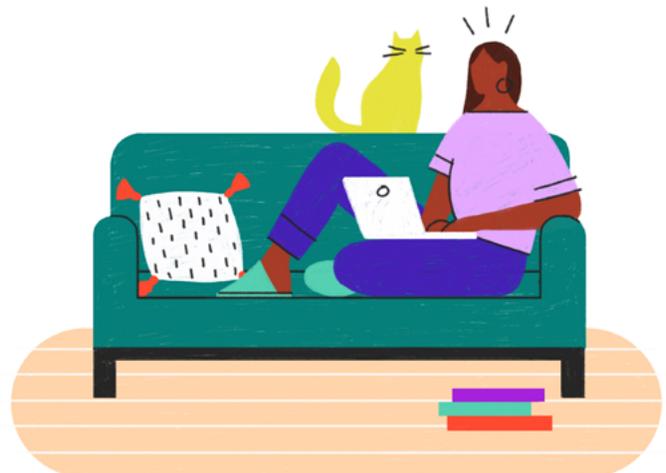
Optimize onboarding for technical team members

There's often time pressure associated with onboarding tech team members (especially engineers) since they're a resource in high demand. "The faster we can get them producing, the better the results for the company," says <u>Aaron Gibralter</u>, Director of Engineering at Greenhouse.

At the same time, your technical team members still need time to adapt to company culture and norms and build connections with their coworkers.

When designing onboarding for tech team members, follow these guidelines:

Don't be afraid to delegate onboarding duties: Managers of technical teams tend to spend much of their time in meetings. This means you won't always be available to help new hires with more time-consuming tasks like setting up their dev environment. Find other members of your team who can step in to help out with these tasks.

Take a scaffolded approach: Start their first week with a lot of support and gradually give your new hire the chance to get some small wins under their belt.

The Zapier engineering team assigns a small task like a wellscoped GitHub issue or a tiny feature update. "That early win builds confidence and momentum," says Brian Cooksey, the Platform Engineering Lead at Zapier. "It also sets the precedent for the expectation we have of shipping things."

Introduce tools thoughtfully: Give new hires access to the tools they'll be using in their roles and the chance to try them out as soon as possible. This is a key part of technical onboarding, according to GitLab. "Using tools, even for very small tasks, builds confidence and helps new employees to feel productive and empowered."

Broaden your scope beyond tech: Don't forget to provide the broader context of your company's business and culture. Make sure your onboarding includes time for new team members to connect with cross-functional teams outside your department so they get a big picture view of your company and current business initiatives.

Empower technical employees to answer their own questions

Empower new hires to adapt to asynchronous communication and seek out information on their own. For example, GitLab maintains a detailed online handbook that teaches employees to be self-sufficient and proactive when looking for answers.

Zapier encourages tech employees to ask questions, but also to be intentional about when and where they ask them. As Brian Cooksey, Zapier Platform Engineering Lead, says "A new person needs confidence to ask a question in a 70-person Slack channel. They also need to know how to filter down all the available communication channels to the ones most relevant for their job." It helps to create a process or let your tech team members design their own. One new data scientist at Pinterest described her approach: "My protocol for asking a question: Google it; Search it in Slack history; Search it in our wiki or shared Google drives; if I'm still stumped, I'd ping my onboarding buddy…
[I can also] search inside Pinterest's internal tools."

Supplement technical know-how with essential soft skills

It's easy to focus on the technical skills your new hires will need to succeed in their roles. But don't forget about soft skills, too. **Udemy course consumption data indicates four significant soft skills trends.**

1. **Wellness skills** like anxiety management and resilience build a healthy foundation. Employees perform better when they take care of their minds and bodies.

2. **Leadership skills** like decisionmaking promote organizational strength and agility.

3. **Communication skills** keep the remote workplace running.

4. **Productivity skills** help separate the signal from the noise, which is especially important when dealing with the distractions of working from home.

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Customize onboarding to meet the needs of new managers

Whether you're hiring a new manager externally or promoting an existing employee to a leadership position, onboarding new managers requires a set of different considerations than typical onboarding.

And the remote setting brings more challenges. Yet only <u>17% of leaders say</u> their organization has developed a system for onboarding new leaders in a remote work environment.

Here are a few points to keep in mind when onboarding new managers remotely:

Provide plenty of context: Harvard Business Review recommends creating a structured learning process so new leaders can access information effectively. Organizational charts, financial reports, strategy and project documentation, and your crisis response plan will all help new leaders hit the ground running.

Help leaders forge quick connections: New leaders need help navigating your organization and getting to know their key stakeholders and peers, even if they've already been working at the company. Give your new managers a list of people to meet and context for how they're likely to work together. Send personalized email intros to each stakeholder to reinforce the new relationship.

Asana recommends prioritizing 1:1 interactions rather than group meetings so leaders can have their questions answered immediately and shape the onboarding process based on their own needs.

Prioritize team-building: Managers don't just need to develop relationships with other leaders — it's equally important to create a sense of unity and purpose on their own teams. You can facilitate this process by providing a consultant or coach who can work with the manager to set expectations and establish clear communication with the team.

Introduce company policies and protocol: Make sure your managers know how to handle common occurrences like requests for time off and performance conversations. And don't forget company norms and guidelines about work, especially when it comes to meetings and working hours in the remote setting.

Encourage openness and transparency: Stef Miller, Director of Demand Generation at Udemy Business, recommends leaders create a "Working with me" document to share their communication and work preferences. Leaders can use this to describe when they tend to check and respond to email, how they like to receive feedback, and any other information that sets up a strong foundation for working together well.
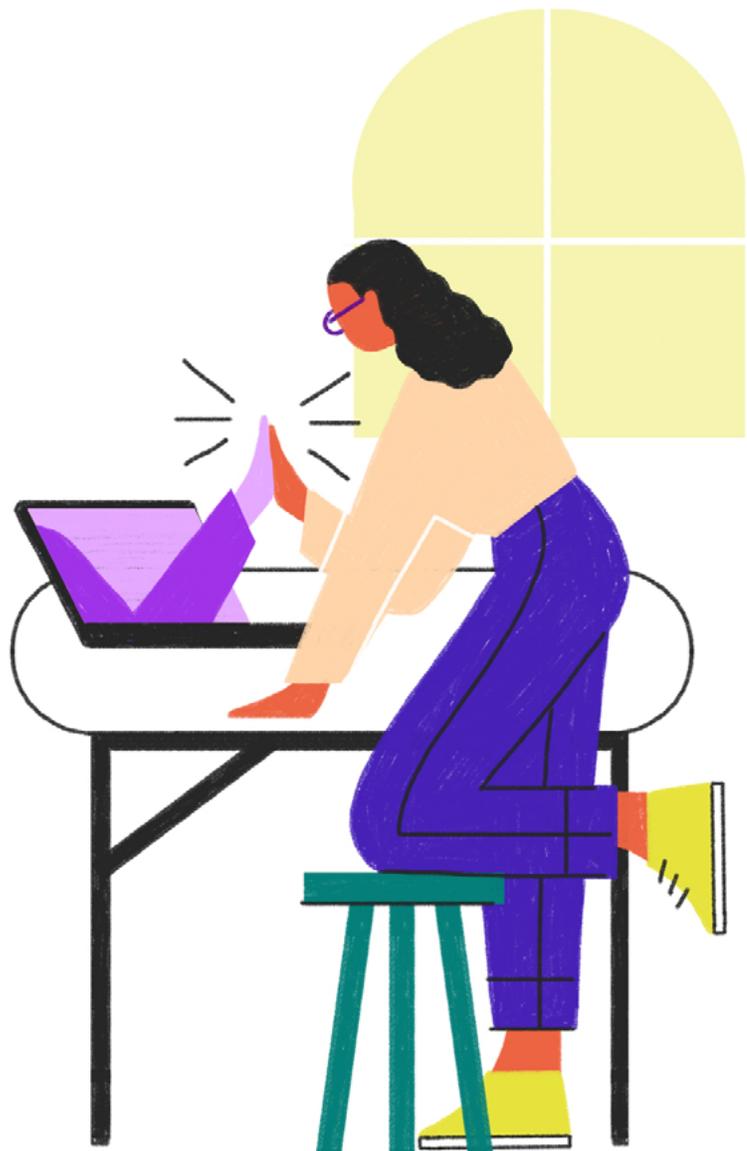
Chart the course for internal hires to succeed as new leaders

"Make internal mobility part of your company culture," says
<u>Cara Brennan Allamano</u>, Senior Vice President of People, Places, and Learning at Udemy. Cara recommends mentorship programs that pair junior employees with more experienced individuals. Encourage employees to schedule informational interviews with leaders in other departments, attend their departmental meetings, and participate in cross-functional projects. And, of course, provide plenty of learning opportunities for employees so they're ready to take on that new role when the opportunity arises.

Build a blended learning program to reinforce core leadership values

Leadership development is a process that successful companies take seriously.
To ensure your leaders and their teams are positioned to do their greatest work for your organization, you can:

1. **Create a playbook for training managers.** This can include relevant courses like <u>handling difficult conversations and career navigation</u>, plus ideas for activities and discussion prompts.

2. **Empower leaders to learn from one another with group training for managers.** Use the playbook as the curriculum for your <u>blended learning program</u>.

3. **If your organization uses Udemy Business, create and use custom courses** to set common standards for leadership at your organization.

Don't forget — onboarding is just the beginning

In this guide, we explored how a positive onboarding experience sets new hires up for success. The opposite is true, too. In jobs where people left within the first six months, almost 4 out of 10 said a more effective onboarding process could have helped them stay longer.

Good onboarding isn't just about retention, either — organizations with a standard onboarding process experience 50% greater new-hire productivity. Develop a thoughtful approach to onboarding and you'll quickly see a return on your investment.

But onboarding is just the beginning. How can you build a positive employee experience that lasts beyond a new hire's first few months on the job? Udemy can help. **Get in touch with our training experts** to learn how we support learning and engagement at every step of the employee lifecycle.

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Udemy Business

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