udemy business

Workbook

11 Steps to Onboarding New Employees Remotely

New hire onboarding is a make-it-or-break-it moment for your employees.

Those 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%.

In a world where remote work is increasingly common, onboarding takes on even more importance, especially for direct managers. New hires need extra support to understand their role, familiarize themselves with your company culture, and adapt to your team's norms and expectations.

This checklist will help you create a thoughtful and effective onboarding program for your remote employees.

Checklist

☐ **Step 1:** Welcome your new hire to the team

☐ **Step 2:** Ship the necessary hardware and software

☐ **Step 3:** Share your excitement and build their anticipation

☐ **Step 4:** Recruit an onboarding buddy for them

☐ **Step 5:** Add them to important communication channels

☐ **Step 6:** Announce their arrival in advance

☐ **Step 7:** Make their first day memorable

☐ **Step 8:** Discuss responsibilities and expectations

☐ **Step 9:** Introduce and immerse them in your culture

☐ **Step 10:** Meet more frequently at first

☐ **Step 11:** Ask your new employee for feedback

Step **1** # Welcome your new hire to the team

In addition to sending your new hire the necessary paperwork to make everything official, let them know how excited you are to work with them. Send the email as soon as possible after they've accepted the position. This helps quickly establish a sense of social acceptance, which is linked to new employee success.

Here are a few points to include in your welcome email:

Congratulate them on joining your team and share your excitement that they've accepted the role.

Confirm their start date and let them know what to expect on their first day.

Mention the items they should look out for in the coming days and weeks, which could include:

- Paperwork from human resources (HR), like employment eligibility, tax forms, contract, and so on.
- Hardware and software from IT.
- A welcome kit (more details about this in Step #3).

Encourage them to reach out if they have any questions or concerns before their start date.

Pro Tip

Ask team members who met the new hire during the interview process to send a personalized email or LinkedIn message to welcome them to the team. This begins to create connections with new team members and further contributes to a sense of social acceptance.

Step 2 # Ship the necessary hardware & software

Submit tickets to your IT team letting them know what tools your new employee will need — as well as where and when to send them. When their equipment is on the way, send the new hire a note that includes a list of items in transit, the package tracking information, and relevant setup instructions.

Pro Tips

Keep tabs on the package tracking to verify delivery and assist the hire with any issues.

Consider giving new hires a stipend to purchase necessary supplies, like a mouse, keyboard, and external monitor.

If your organization uses Udemy Business, you can create a custom course that walks new employees through their equipment setup or introduces how your team uses specific software. Take a look.

**Step** **3** # Share your excitement & build their anticipation

Demonstrate the value your new hire brings to your team and the company by sending them a welcome kit that includes:

A thoughtful note: This is a personalized, preferably handwritten note that expresses your excitement for their arrival.

Some awesome swag: A company-branded welcome gift helps your new hire immediately feel like they're part of the team. It can be something practical like a water bottle, notebook, or coffee mug — or maybe something a little more fun like laptop decals or a cozy blanket You might even include a book that has influenced company values or its founders.

And a treat: This additional item — either in the form of a gift card or snack delivered to their home — is the "icing on the cake" that gives new hires a taste of what's the come.
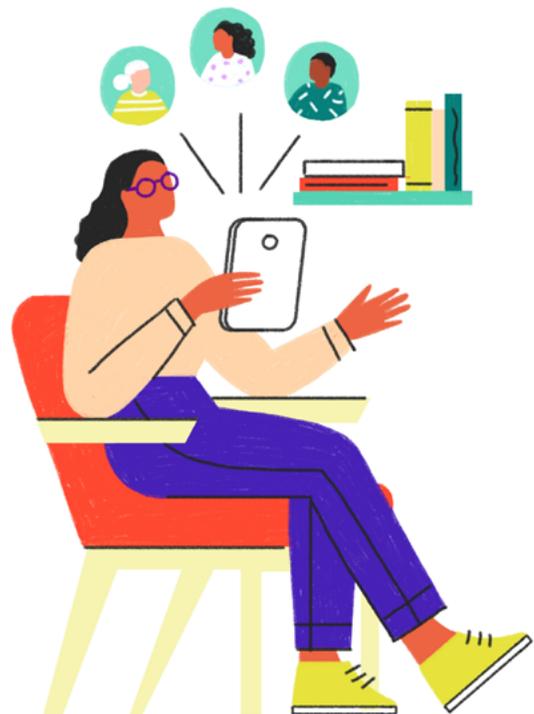
Step **4** Recruit an onboarding buddy for them

Working remotely can be an isolating experience. New hires may also worry about bothering their busy managers or interrupting their work with too many questions. Fortunately, there's a simple solution — give your new employee a lifeline by assigning an onboarding buddy.

An onboarding buddy gives your new hire the opportunity to ask questions without fear of embarrassment and build a sense of belonging with.

Onboarding buddies aren't just nice-to-have, either. When Microsoft piloted their onboarding buddy program, new hires reported feeling more productive. In fact, those who met with their buddy more frequently felt more productive than those that met less frequently. The right match is also important when choosing an onboarding buddy for your new hire.

During their pilot program, Microsoft's guidance to managers came down to three key characteristics:

1. Buddies should have sufficient knowledge about the new hire's role.

2. Buddies should have a strong job performance history.

3. Buddies should have time to assist the new hire.

An onboarding buddy program is mutually beneficial to your new hire and the buddy. People who volunteer to be an onboarding buddy have an opportunity to demonstrate their management capabilities. They also strengthen their skills and knowledge by teaching them to someone else.

Step **5** Add them to important communication channels

In a remote work environment, your new hire will already know where the bathroom is located. What they might not know is where everyone gathers and communicates virtually. So make sure to add them to the essential communication channels, such as team and project channels on Slack and relevant email aliases.

Pro Tip

Create a Slack channel or email alias for new hire cohorts and invite them to share all their questions there. In addition to giving new employees a safe place to clear up any confusion they might have, it also creates a sense of belonging among the new hires.
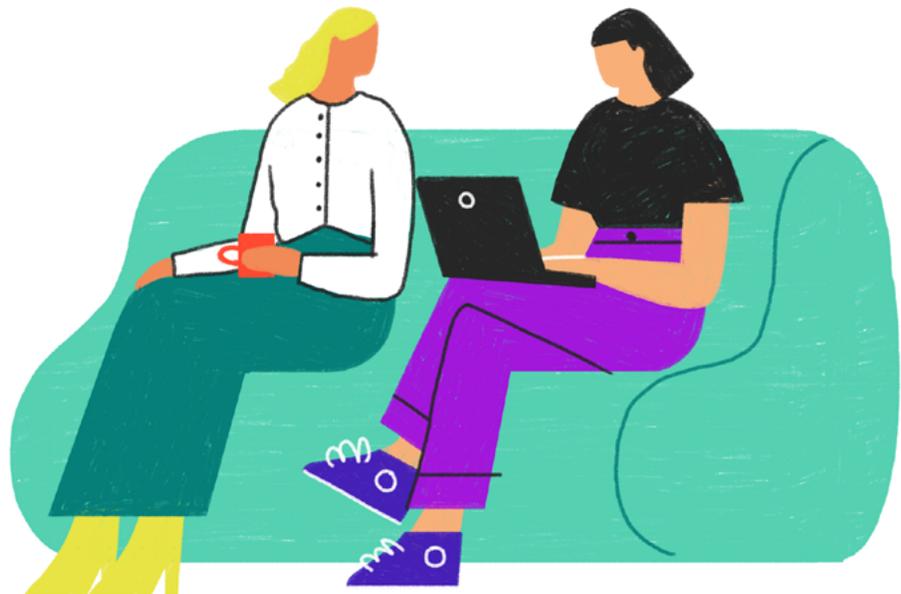
Step 6 Announce their arrival in advance

A day or two before your new hire is scheduled to start working, remind your team and any relevant stakeholders of their impending arrival. More specifically, let colleagues know:

> Why you're excited about the new hire joining the team.
>
> Who they'll be working with and reporting to.
>
> What to expect during the first few weeks.

Please make sure to help welcome them to the team. And if you see any opportunities to make their first days easier or help them with their goals, projects, or learning objectives, don't hesitate to reach out.

Announcement example:

New Message   — ⤢ ✕

To All participants   Cc Bcc

Subject **{Company Name}** Arrival announcement

Hello **{Team name/stakeholder name}**,

Exciting news! **{New hire name}** will be joining our team as of **{Start date}**. They will be **{Quick explanation of job duties}** and reporting to **{Manager name}**. **{New hire name}** will also be working closely with **{Team or team member name}** and **{Team or team member name}**.

During their first few weeks, **{New hire name}** will be:

• **{Goal/project/learning objective}**

• **{Goal/project/learning objective}**

• **{Goal/project/learning objective}**

Step **7** Make their first
day memorable

The first day of a new job can be overwhelming under normal circumstances. When joining the team remotely, it can be even more stressful.

The remedy, according to Udemy Director of Demand Generation Marketing Stef Miller, is to go beyond the required paperwork and stereotypical spiel about your organization. "Sweat the details and find every opportunity to exceed their expectations," she says.

Stef encourages managers to focus on people, not process. Here are a few ideas to make your new hire's first day special:

Send a virtual greeting card: Use a service like GroupGreeting or Kudoboard to send a personalized virtual welcome message from your team.

Open a window into your new hire's world: Ask new hires to document their first day with photos and videos. They can share their experiences through team chat groups or company intranet. What does their "commute" look like? How have they set up their workspace? Who are their coworkers (this could include their spouse, children, pets, or even a favorite house plant!)? More importantly — who are you? What you reveal about yourself will build trust right out the gate.

Make time for casual connections: Schedule a few "coffee breaks" throughout the day so the new hire has the chance to take a break from scheduled onboarding activities and can casually chat with a few team members.

Ease apprehensions and help them settle in: Make sure to set aside time for icebreakers so new hires can get to know the team members they'll be working with most closely. Some activities like two truths and a lie are easy to adapt to a video call. Get inspiration for other virtual icebreakers here.

Step **8** Discuss responsibilities & expectations

Whether a new hire is an individual contributor or team leader, they need to know what success looks like in their role. And don't discount the specifics of your company's culture and norms.

The top reasons for failure in a new role are a poor grasp of how the organization works and a misfit with organizational culture. You can help by answering three key questions:

1. What are your new employee's responsibilities?
2. How should they go about doing it?
3. Why is it important they accomplish it?

Additionally, consider the unique circumstances related to working remotely. Share expectations for working from home:

How often should they check-in?

Are there company-wide norms they should follow?

How often do you encourage them to unplug and avoid burn out?

Don't just provide this information verbally. Put it in writing so they can reference it later.

Pro Tip

In addition to job-related milestones, make sure your new hire meets with key stakeholders. Create a list of teammates and cross-functional partners they'll be working with frequently and instruct them to schedule 1:1s within the first 30 days.

Step **9** Introduce & immerse them in your culture

When everyone is in an office, employees have ample opportunities to casually connect with one another. But in a remote setting, those opportunities can be few and far between. **Help new hires out by scheduling time for teammates to connect outside of their day-to-day. Here are some ideas to consider:**

Lunch or coffee roulette: Randomly pair employees with people across the company for virtual lunch or coffee. In addition to giving new employees the chance to connect with people they might not have met otherwise, this also helps them better understand your company and its different functions.

Team fun activities: On a weekly or bi-weekly basis, block out 30 minutes for employees to participate in something fun. A game of trivia, for example, can help a new hire show off their passions and get to know their teammates better.

Ask me anything (AMA): During your team meeting, help your team get to know your new employee better by adding a brief AMA to the agenda. By putting your new hire in the hot seat and letting their teammates ask questions, they'll discover shared interests — like a favorite vacation spot or ice cream.

Step **10** # Meet more frequently at first

As a new employee ramps up, more frequent 1:1s with their manager are critical — and mutually beneficial. Your new hire gets to ask for feedback and make sure they're on the right track. And their manager gets an opportunity to learn more about the employee and their working style.

Meeting agendas may vary depending on the role, but here are a few categories you may want to include:

Items to discuss this week

Items to revisit later

Challenges and learnings

Goals or desired outcomes

Action items

Especially in a remote setting, it can be more beneficial to have short, more frequent meetings. This ensures new hires never go too long without having the opportunity to ask questions or get feedback.

Step **11** Ask your new employee for feed

Speaking of feedback, the most critical component of your onboarding process is continual improvement. Ask your new hires to rate their onboarding experience so you learn what's working — and what isn't. This is especially important in a remote environment where new hires aren't able to share their feedback through casual conversations or in-person sessions.

What should you include in your post-onboarding survey? **Culture Amp recommends using a 5-point Likert scale that measures agreement to the following statements:**

I feel welcome here.

I am proud to work for [Company].

I would recommend [Company] as a great place to work.

I have had good training on the processes applicable to my role.

I have a good idea about what I still need to learn to do my job well.

The organizational values of [Company] align well with my values.

My role so far matches the role description provided to me.

Scale your onboarding process and accomplish more in 2021

With the right onboarding process, <u>research shows</u> you can ramp new employees up 50% faster, enabling them to drive your business forward sooner.

Need to support new hire onboarding but have limited headcount to help you manage the process? Technology can support your onboarding programs. But it takes the right partner to scale it.

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