

Best Practice Checklist for Onboarding Remote Employees

Employee onboarding is the first opportunity and potentially the most important time to introduce and instill the culture of an organization. Here are some best practice tips to consider making sure that you can more effectively onboard employees remotely. Remember to use the “New Hire Checklist” in Carson Coaching Online for the more general new hire items.

Set up

- » Supply the new hire with appropriate technology and resources. Be sure to plan for extra time if you are shipping the resources to the new hire or arrange a contactless pickup at the office.
- » If you are supplying a new laptop you may need to plan for additional time to install appropriate security and software.
- » Prepare an inventory checklist of the resources that you supply and include any technology equipment guidelines.
- » Schedule time with your IT technician and the new hire to assist with set up.
- » Technology and resources may include:
 - Laptop
 - Multifunctional Printer
 - Webcam
 - Dual Monitors
 - Phone
 - Headset
 - Docking station
 - Keyboard
 - Mouse
 - Greenscreen background if the new hire doesn't have an office area and is meeting with clients
 - Basic office supplies (pens, paper, etc.)
 - Additional resources per the requirements of the job

- » If the training manager has not had previous experience with video conferencing have them do a few practice sessions in advance.
- » Provide the new hire with resources for training on the preferred video conference tool used.
- » If you have yet, try to move more to a paperless office setup and platforms
- » Update all processes and workflows within the software and platforms you are using

Communication

- » Set daily check-in calls with the new hire, moving to less frequent, but still regular meetings as the new hire is more established in the role
- » Be sure to ask about challenges that they may be experiencing working from home, especially if this is their first time as a remote employee
- » Have a system to track goals, projects and other important tasks. The Carson Coaching team uses Asana to track all the team's goals and to-do's in the weekly meetings
- » Share the communication norms with the new hire, such as using video conferencing in scheduled team meetings, or using an Instant Message or Email for urgent questions
- » Consider using a team chat resource like Microsoft Teams, Slack, etc. And setup separate channels for "water cooler" chat, ASAP and general information.
- » Setting up One-on-Ones with the team and skip level meetings to get the team acquainted.
- » Be upfront with the new hire if virtual onboarding is new for the office and ask them to provide feedback along the way that will help you improve the experience

Training

- » If possible maintain a "first day" type of experience, setting up meetings and potentially having a virtual lunch with members of the team.
- » Use a 100-day training plan, while this is always a recommendation, it is even more critical with remote employees
- » Provide a list of activities and training that the new hire can complete in down time, such as reading, lessons and specific projects or tasks.
- » All training should be done virtually via a video conference tools like Microsoft Teams, Zoom, Webex, etc.

Culture

- » Look for ways to connect the new hire to the culture, share with them about the activities and events held in the past and planned for the future.
- » Have the new hire fill out a “New Hire Get to Know Me Form” *available in Carson Coaching Online
- » Consider adding a few company virtual happy hours, or lunches to allow the entire team to come together outside of the regular team business meetings.
- » Add a question of the week to the team meetings, or regular questions like “What were your biggest personal and professional accomplishments since the last meeting?” Making time for “small talk” will help build a stronger rapport with your new hire and the entire team
- » Send the new team member a small gift at beginning and/or end of the first week. At Carson we always make sure that new employees have a few pieces of “swag” when they join the team.
- » Plan to get together for a team retreat at least once a year, quarterly is ideal, if possible.



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