A Step-by-Step Guide to Onboarding IT and Digital Employees Remotely

FINITE

There's no doubt that the Coronavirus Pandemic has changed the way we do business.

Our team at **Finite IT** have been consulting with our clients to assist them through this interesting time and help them strategically plan their approach to business and staffing right now, and for the future.

Because one thing is for sure, businesses need great people to achieve their goals.

And one of the major challenges companies are facing right now is onboarding new employees remotely.

To support you, we've put together this guide to help you structure the first 90 days of your new employee's remote onboarding experience.

But first, a good onboarding process actually starts before their first day - and it's called preboarding.

Preboarding: What to do the month before your new employee starts

Especially in the current climate, candidates are nervous to leave their job for your company's role. They're afraid to be the newest person at a company when they're making cutbacks, and need to know that you have their best interests at heart. After they accept your offer, and during their notice period be sure to:

☐ **Send regular updates** - Even if you're jumping on the phone or sending an email with the message "nothing has changed, we're still excited to bring you onboard", it's important to touch base with your new hire at least once a week, if not more during the current situation. Another nice reason to touch base could be to introduce them to the team, or provide some early training.

☐ **Be available to answer questions** - Throughout all stages of the recruitment process, your new employee is likely to have many more questions than usual. Be ready to answer them and give detail around onboarding procedures and hiring policies during COVID-19.

☐ **Get prepared** - Don't leave it until their first day to put together a schedule and onboarding plan. Use this time to set up the online technology you need to onboard your new person effectively - this could be everything from pre-filming online training, to getting existing team members to prepare online documentation of processes.

☐ **Set them up for success** - There are three main categories to consider here, technology software, technology hardware and home workspace:

  ☐ **Tech Software** - Set up a company email, provide logins to software used regularly and share access to folders or documents needed. This is when you should ensure the new employee understand which messaging and video applications your team uses (e.g. Microsoft Teams, Zoom etc.) Send them information on your cybersecurity policy and how to securely use their home wifi.

  ☐ **Tech Hardware** - You'll need to have a laptop and other technology sent to their home. Depending on your company policy that might include a mobile phone, keyboard, docking station, extra computer monitor, mouse, headset etc.

  ☐ **Home workspace** - Make sure they have the information they need to set up a safe work from home (WFH) space. A desk chair and dedicated desk, a light open space and a separate space for "work" versus "life" are essential. This should include a WFH Guide and Workplace Health & Safety Risk Assessment Schedule, so that they can self-assess and confirm back to you that are satisfied they have a safe home workplace.

☐ **Provide HR and IT contact details** - Usually this introduction can wait until your employee's first day in the office, but when someone is being onboarded remotely, they will need to set their WFH space up ahead of time. So, at this point you should supply HR and IT contact details so your new hire can reach out with any concerns or challenges they may have with WFH now, or in the future.

Day 1: What to do on their first day with your company

☐ Make a schedule and share it with them before their first day. For example:

9:30 am: One-on-one casual meeting via video conference

This time is about having a chat and telling your new hire what to expect today and for the first week. Don't get bogged down in role requirements and detail just yet. Consider inviting them to make themselves a tea or coffee to enjoy while you're chatting so they know it's informal.

10:00 am: Team meeting via video conference

Hosting a team video call on their first day is important so they know who is in the team and who they can go to with questions. At this point you should also share a list of all relevant employees, their roles, and their contact information.

11:00 am: Company/role briefing via video conference

During this meeting, give your new starter an introduction to the company. If you have any documentation or a company handbook, share it now. Then, run your new employee through your well-prepared roadmap of what they will do over the first few weeks. Talk about their KPI's and the tasks and requirements they will be responsible for.

1:00 pm: Lunch

2:00 pm: Training session with mentor, colleague or buddy via video conference

It's important for your new hire to have exposure to others in the team. Consider connecting with them a "buddy" - someone experienced in the team who will support and guide them.

3:00 pm: Free time

Allow this time for your new employee to get their head around all the new information. They can research your company and competitors further, start working on projects, set up their email and so on.

4:00 pm: Afternoon check in via phone call

Allow this time to ask your new employee on how their first day went, run over any HR paperwork and answer any questions. At this point, schedule in weekly and monthly meetings that you can use to check in on progress.

4:30 pm: Feedback

If it aligns with your company culture, then giving your employee some initial feedback on their first day will help them digest all the information they've received and debrief with their house mates. This will help them remain refreshed and eager for longer.

Days 2 - 5: What to do over their first week with your company

The rest of the first week is critical. You should stick to your usual onboarding strategy, but tweak it to suit your remote needs.

☐ **Have a project ready to go** - Give your new starter a project they can work on from the get go, ideally one they can be actively involved in but isn't overly complex so they feel like they are getting an early win. Connect them with the right people via video conference and make sure they have a detailed briefing with the project leader.

☐ **Don't forget the social** - Don't ignore the social aspect of the role. You should still use video calls to introduce your new starter to senior people in the company and if your company has a mentor program, introduce them to their mentor early on. Also consider hosting "team drinks" on Friday afternoon via video conference. Try downloading the Houseparty App (you can video chat while playing games like Trivia), having a "best dressed" competition or running an awards night.

☐ **Offer training** - You should be offering both internal and external training. Connect your new team member with existing employees for role specific training. Consider pre-recording product or process demos to better explain through video and make sure the trainer follows up after each training session to answer questions. Check out the cheatsheet on the last page for the best online training platforms for external training.

☐ **Request feedback** - New hires should be encouraged to voice their thoughts by specifically requesting direct feedback from them. Because remote onboarding may be new to you, this feedback will be valuable for improving the experience for this new starter, and the next to come. This feedback should cover their own experiences as well as feedback on the onboarding program itself so you can continually improve it.

Months 1 - 3: What to do over their first months with your company

☐ **Build connections** - Especially remotely, it's not always possible for new hires to meet everyone they need to know in the first days or weeks. Continue building connections with other employees throughout the first month. Their mentor or buddy can be vital to help establish these connections.

☐ **Create a development plan and career path** - New hires like to know exactly what is expected of them so sitting down via video with a manager to establish clear, measurable, and achievable goals is a key part of accelerating them towards peak productivity. This is an opportunity to discuss where they have room for development, what can be done to support them, and the roles they'd eventually like to work towards.

☐ **Set review timelines** - Timelines should be set for all deliverables as well as establishing when check-ins will occur to communicate and review progress. This should be a regular event, it should be far more frequent than just occurring at an annual performance or salary review.

☐ **Encourage greater contributions** - Encourage new employees to volunteer new ideas. Sometimes a fresh set of eyes can be invaluable. They should also be encouraged to take a larger role in projects and take on the full set of responsibilities that the role entails.

At the end of the day, your remote onboarding program shouldn't be too different to your usual plan. You can provide a similar structure, training and social connection as you usually would in the office - thanks to a little creative thinking and innovative technology. In fact, we've included a Remote Onboarding Tech Cheat Sheet for you on the next page.

During these uncertain times, our **Finite IT** consultant team is here to help. No matter what employee challenges your business is going through right now, our team is available to chat - no strings attached. Please feel free to get in touch to speak with someone.

BONUS: Remote Onboarding Tech Cheat Sheet For You And Your New Remote Hire

Time Management & Productivity Tech

Rescue Time
Trello
Evernote
LastPass
Focus@Will

Team Collaboration Tech

Slack
GoToMeeting
Flowdock

Video Conferencing Tech

Zoom
Microsoft Teams
Google Hangouts
BlueJeans
Skype
GoToMeeting

Project & Workflow Management Tech

Monday
Asana
Jira
Scoro
Podio

Training Platforms

SAP Litmos
Adobe Captivate
TalentLMS

Online Learning Platforms

Udemy
Skillshare
Masterclass
Coursera
Ted
YouTube

File Sharing & Cloud Systems

Dropbox
Google Drive
iCloud
OneDrive

Team Building Tech

Houseparty
Words with Friends
Teambuilding.com
WhatsApp
Facebook Messenger

A note from the Managing Director

Finite IT are experts in the Australian tech sector and can help candidates understand exactly where their skills are most in demand. **Finite IT** helps candidates find their dream tech, digital and business transformation roles.

Tracy Thomson
Founder & Managing Director
Finite Group

About Finite IT

From humble beginnings, we've grown into a broad network of specialist recruitment professionals, who can help connect you with great candidates and candidates with amazing career opportunities.

We understand that just as each job is unique, each candidate is unique. So, we focus our energy on giving candidates access to the best companies, leaders and roles that align with their individual personality, vision and goals.

Interested in finding out more? Get in contact with your local **Finite IT** office today.

Sydney
Level 23, Angel Place, 123 Pitt Street,
Sydney, NSW 2000
T +61 2 8243 6868   **E** sydney@finite.com.au

Brisbane
Level 20, 307 Queen Street, Brisbane, QLD 4000
T +61 7 3232 2300   **E** brisbane@finite.com.au

Melbourne
Level 33, 140 William Street, Melbourne, VIC 3000
T +61 3 9617 3900   **E** melbourne@finite.com.au

Canberra
Level 2, 14 Moore Street, Canberra, ACT 2601
T +61 2 6243 6400   **E** canberra@finite.com.au

Adelaide
Level 12, 25 Grenfell Street, Adelaide, SA 5000
T +61 8 8224 3800   **E** adelaide@finite.com.au

Perth
Mezzanine, 28 The Esplanade,
Perth, WA 6000
T +61 8 9219 3500   **E** perth@ finite.com.au

Auckland
Level 10, AIG Building, 41 Shortland Street,
Auckland, NZ
T +64 9 300 3095   **E** auckland@finite920.co.nz

Wellington
Level 14, ASB Tower, 2 Hunter Street,
Wellington 6011, New Zealand
T +64 4 978 1888   **E** wellington@finite920.co.nz