

Onboarding New Hires

Comprehensive guide to doing it effectively and efficiently

Authors:

Justin Hamade

Mark Olsson

Penny Longman

Jennifer Philips

Gerard Pietrykiewicz

Samin Saadat

Nathan Wawruck

About authors:

Justin Hamade – Software Development Leader ([LinkedIn](#))

Justin is a software development leader with experience building and managing software teams for startups, agencies and enterprise software companies. Justin enjoys bridging the gaps between business, human resources and technology. Outside of the office Justin enjoys playing and coaching multiple sports.

Mark Olsson – IT Strategy Leadership Consultant ([LinkedIn](#))

Mark is passionate about guiding people and businesses through the process of digital evolution. As a technology leadership consultant he uses a wealth of technical background paired with IT leadership skills to help companies in a variety of areas and industries. His projects cover all stages of business growth and needs, including strategic planning, business transformations and major system implementations.

Penny Longman – Senior Information Systems Consultant ([LinkedIn](#))

Penny has combined geoscience, ecology, mining and information systems in various careers over the last 25 years. Currently she works with companies to transform their corporate IT into dynamic Information Systems departments that add value to organisations. Her most treasured accolade is that she “always makes us think about things differently, even if she doesn’t always change our minds”

Jennifer Phillips – Operations Consultant ([LinkedIn](#))

Jennifer is a people, process, & operations consultant. She has a passion for effective organizational change, bringing order to chaos, and improving processes and culture. She enjoys volunteering, traveling to new places, and shepherding positive organizational change.

Gerard Pietrykiewicz – Project Manager / Entrepreneur ([LinkedIn](#))

Gerard is a Project Manager specializing in Webapp and FinTech projects. In addition to his full time job, he is a Business Consultant and an Executive Coach. His personal motto - “I’m a Project Manager, I turn coffee into results” - perfectly summarizes his passion for coffee.

Samin Saadat – Employee Engagement & Organizational Psychology Consultant ([LinkedIn](#))

Samin is on a mission to bridge the gap between science and practice in Organizational Development through Jalapeño Employee Engagement – leveraging technology and professional human services to bring research findings to life to help companies save invaluable dollars and to help individuals enhance their quality of life.

Nathan Wawruck – Recruitment Consultant ([LinkedIn](#))

Nathan is a recruitment consultant with over a decade of recruiting experience, and over two decades in the technology industry. He specializes in connecting software, IT and creative professionals with career opportunities in Vancouver, and around British Columbia.

About authors:	1
Justin Hamade – Software Development Leader (LinkedIn)	1
Mark Olsson – IT Strategy Leadership Consultant (Linkedin)	1
Penny Longman – Senior Information Systems Consultant (LinkedIn)	1
Jennifer Phillips – Operations Consultant (LinkedIn)	1
Gerard Pietrykiewicz – Project Manager / Entrepreneur (LinkedIn)	1
Samin Saadat – Employee Engagement & Organizational Psychology Consultant (LinkedIn)	1
Nathan Wawruck – Recruitment Consultant (LinkedIn)	1
Part 1: Overview	4
About This Guide	4
What Do We Mean by “Onboarding?”	4
Best Practices	5
Who Is This Guide for?	5
How to Use This Guide	5
Onboarding Roles	6
Part 2: A Chronological Guide to Remote Onboarding	7
Process Timeline Graphic	7
Pre-Employment Overview	7
Hiring Manager Responsibilities	7
Assemble the Onboarding Team	7
Create a Welcome Packet	8
Establish a Day 1 Agenda	8
Set Up Meetings	8
Choose a Buddy	9
Follow Up/Review of Checklist Items	10
HR Responsibilities	10
Complete Required Documentation	10
Send a Company Gift or Welcome Gesture	11
Logistical/Technical Responsibilities	11
Workstation	11
Additional Items	12
Pre-Employment Checklist	12
At Least 3 Weeks Prior to Start Date	12
HR Responsibilities	12
Hiring Manager Responsibilities	12
Logistical/Technical Responsibilities	13
Day 0 Checklist	13
The First Week Overview	13

The First Week Checklist	15
Day 1 Checklist	15
Day 2 Checklist	16
Day 3 Checklist	16
Day 4 Checklist	16
Day 5 Checklist	17
The First Month Overview	17
The First Month Checklist	18
Week 2 Checklist	18
Week 3 Checklist	18
Week 4 Checklist	18
The First Year Overview	19
Probation period	19
The First Year Checklist	20
60-Day Checklist	20
90-Day Checklist	20
Part 3: Best Practices, Templates, and Resources	21
Remote Onboarding Best Practices	21
Psychological Safety	21
Meetings	21
Importance of Written Communication	22
Relationship-Building	22
Resources	22
The “Buddy” Role	22
Additional Resources	23

Part 1: Overview

About This Guide

The year 2020 and the global pandemic showed us how important it is to be prepared for all sorts of unexpected scenarios, including one that involves shifting the entire workforce to remote work. Because of this, we are addressing a simple question “How can we onboard new employees in the most efficient and effective way, while doing so in a complete remote setting?”

For office workers, in-person and remote onboarding tasks are not very different, yet some of the differences will have a significant impact. The differences will affect how quickly the new employee becomes part of the team and how quickly they become fully productive. In this guide, we will highlight those differences and explain their impact.

“One size fits all” does not work well when it comes to business processes of this kind, so it is important to remember that this document is just a guide. However, for best results, we recommend implementing as many of the suggested steps as possible.

What Do We Mean by “Onboarding?”

To onboard a new employee means to bring them into the corporate structure so that they can perform their duties. Structured onboarding is more efficient and effective than an organic process of “just figure it out on your own.”

When a new hire is properly informed about corporate processes, policies, and structure, they are less likely to make mistakes, waste time redoing work, or waste time, not knowing what to do next. Time spent on training and properly informing new hires about internal tools, communication channels, and communication culture helps them become more productive, faster.

The challenge is to do it well, finding the balance between feeding the new employee from a fire-hose and not doing enough. This is one reason we have created a fully-structured plan for the first week, to help you achieve that balance.

Onboarding also means introducing new hires to the culture of the organization. This helps them break the ice and begin building internal professional relationships that will help them perform their duties. This brings efficiency: new hires can ask for help when they need it and won’t hesitate to reach out to people they don’t know. Cultural onboarding also helps new employees navigate internal culture, so they understand internal jargon and know who the “Subject Matter Experts” are who can solve specific problems. For cultural onboarding, the “buddy” role is extremely important.

In addition, having an effective onboarding helps with enhancing the psychological contract and commitment of employees towards their organization. It is important to create an environment where new hires feel connected with a high sense of belonging. When the new hires develop a sense of shared identity while interacting with the team without the fear of being rejected, embarrassed and humiliated, they are more likely to go above and beyond to learn and to contribute to the growth and success of the organization

Best Practices

In the modern work environment, remote work adds a layer of complexity. In addition to the general efficiency and effectiveness expected of every employee through well-established tools like email and voice communication, remote work adds the intrinsic challenges of asynchronous communication using corporate chat tools like Slack or messaging apps.

In addition, fully remote settings remove our natural way of building professional relationships through informal or spontaneous meetings in places like the office kitchen. Without the casual opportunity to get to know each other, established teams may have less engagement and poor communications with the new hire.

For this reason, great communication is probably the most important aspect of onboarding new employees remotely. With the goal of bringing the new employee on board as quickly and efficiently as possible, well-structured and purposeful communication between all parties is of paramount importance to ensure the best possible results.

Who Is This Guide for?

This guide is intended for companies that fit the following profile:

- Size: from 10 to 50 employees
- Type of work: “office jobs,” such as software development, design, marketing, accounting, sales, etc.
- Where the work is performed: Most employees, if not all, work in an office or remote setting

Other companies may also benefit from the advice and best practices in this document, with adjustments.

How to Use This Guide

This document is written for managers with the role of “Hiring Manager” during the onboarding process. A hiring manager is described as a direct supervisor to the new employee. This is a temporary role with specific responsibilities that are only performed during the onboarding process.

We have called out actions required by other organization roles, such as Human Resources (HR) Generalist, Information Technology (IT) Support, and Security Officer. It is important to

recognize that these are roles or functions, not necessarily permanent positions or job titles associated with a specific person.

In the following section, “Onboarding Roles,” we have provided a list of these roles, so you can share this guide with them and help them understand the process you will be following.

Part 2 of this document provides a step-by-step, chronological guide to the onboarding process. We’ve broken the onboarding process into four time periods, providing suggestions and process steps for each period:

- A. Pre-employment
- B. Week One
- C. Month One
- D. The First Year

In Part 3, we have provided useful resources, templates, and best practices to help you onboard employees in your organization.

After reading this entire document, you will be able to adjust the business process steps to suit your organization, and the templates can become part of your organization's document portfolio.

Onboarding Roles

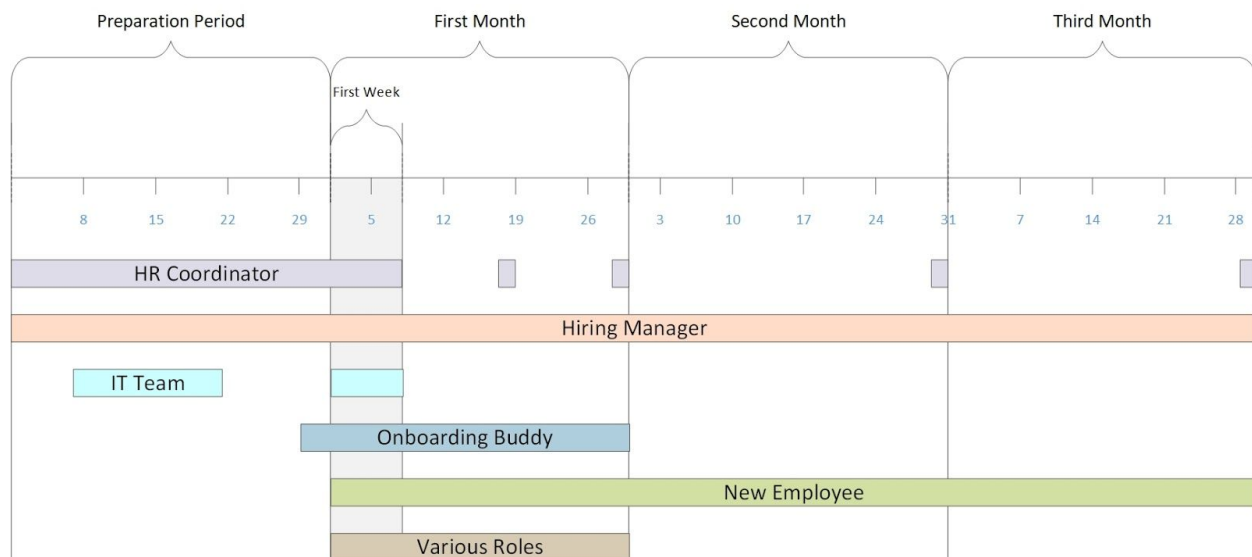
Onboarding roles are functions, not static work titles. One person can fill one or more roles to accomplish your onboarding goals. Here are some of the roles your onboarding team will need; be prepared to create a list with names and contact information for each of these roles:

- Hiring Manager
- New Hire
- Human Resources
- Information Technology
- Buddy
- Security Officer
- Office Manager
- Peers/Coworkers

Part 2: A Chronological Guide to Remote Onboarding

Process Timeline Graphic

The following graphic will help you visualize the process and roles involved in onboarding a new employee in relation to the process timeline:



Pre-Employment Overview

During the period between “You’re hired!” and starting work, a new employee might be wrapping up work at a previous employer, taking a quick vacation, or just enjoying quiet time off before starting a new job.

Meanwhile, at their new employer, there is a bustle of activity as many people get ready for them to start work. During the Pre-Employment phase, the Hiring Manager and a number of other staff members are involved in preparing for the arrival of a new employee.

Hiring Manager Responsibilities

Assemble the Onboarding Team

For each of the onboarding roles, document the name and contact information for the person responsible and make sure they know the expectations. Share this document with them, especially the appropriate checklists.

Team Role Checklist

- ☐ Hiring Manager
- ☐ New Hire
- ☐ Human Resources
- ☐ Information Technology
- ☐ Buddy
- ☐ Security Officer
- ☐ Office Manager
- ☐ Peers/Coworkers involved in onboarding

Create a Welcome Packet

Send the employee a packet of information to familiarise them with the layout of the team and company. This can be paired with the employee welcome gift mentioned in the HR section coming up or sent separately digitally.

With the welcome packet, include any documentation or general information that can be shared prior to their start date that will make their transition smoother. This is not meant to be a pre-work homework assignment, but a small reference guide or “company user manual.” The “Helpful Company Information” packet might include:

- Regular working hours, overtime request process, key company holidays
- How to access the company intranet and any relevant links
- General information about the company
- Link to a brand video
- Buddy contact information
- Roles and bios for their team and manager
- Company rituals/norms for behaviour and gatherings (e.g., regular company Zoom meetings for drinks on a Friday)

Establish a Day 1 Agenda

Create a detailed Day 1 Agenda for the new employee. Schedule meetings, project meetings, and times for online greetings, so they are aware of the timeline and have a roadmap to follow. Give them clear information about times for starting, stopping, and breaks.

Set Up Meetings

The hiring manager should include the new hire in any necessary company communications prior to their start date, should determine meeting schedules, and set up regular one-on-one review meetings in advance. This will establish the expectation for regular communication with the remote worker.

It's important to set up at least the first week of meetings, not only for debriefing but also as a social interaction between the new employee and their project team. Ideas for meetings include:

- Team drinks over a remote session at the end of the first week
- A welcome chat from the owner/CEO of the company or another VP
- Regular check-ins by Hiring Manager and HR
- Regular departmental and interdepartmental meetings for information and meet-and-greets
- Any and all project-related meetings (virtual standups, weekly debriefs, etc.)

Set a schedule of one-on-one meetings with the rest of the team so that they can meet the new employee and begin the knowledge transfer. Arrange for job shadowing each day with a different employee, potentially using screen-sharing techniques and live demonstrations to increase the interaction with their co-workers.

Do not forget the existing employees! The following are some ways to include existing employees in the onboarding process:

- Meet with existing team members to inform them of the new position and share the new employee's credentials and roles and responsibilities.
- Set up transfer of knowledge meetings between existing employees and the new hire.
- Encourage team members to introduce themselves early on and to be friendly and helpful to the new hire whenever possible.

Choose a Buddy

Select a buddy for the new employee several weeks prior to the employee's start date, and give them time to get ready for the onboarding process. Rather than a long-term career mentorship, this role refers to an informal role to help introduce the new hire to more people, check-in with the new hire about their experience, and serve as a sounding board for any questions a new hire might have. This person should not be the new employees' sole source of contact with their peers and coworkers.

A buddy can be selected in several ways, but this task should not be forced on any employee. Picking the right mix of temperament, personality and peer respect/interaction is important to the success of the relationship. Try to establish a pool of buddies, so no single person becomes overtaxed with the responsibility.

You can ask for volunteers or hold one-on-one conversations with likely candidates. Criteria for a good buddy include:

- Positive on-the-job attitude
- Peer and subordinate respect
- High-quality job performance
- Good organizational and time-management skills
- Patient temperament and/or natural trainer mentality

Before the new hire starts, make sure you have buddy guidelines and expectations in place and have shared them with the employee who will be taking on this role. It is also important to allow them enough time in their schedule to be an effective resource for the new employee. In addition to assisting the new employee with any problems that arise, they may need time to work with management or other staff members to help resolve those issues.

Providing dedicated lines of communication between buddies is especially important. The buddy should establish several pre-set meeting times through remote sessions (Skype, Zoom, Teams, phone call, etc.), so the new employee can ask questions that have come up without feeling pressured. If possible, include the buddy in a pre-employment meet-and-greet (during the interview process) to help the two of them establish a relationship before Day 1 and gauge fit.

Follow Up/Review of Checklist Items

For each of the areas below, the hiring manager should follow up to make sure items have been completed and there are no outstanding issues or questions.

HR Responsibilities

The HR role is responsible for including the new employee in any company-wide communications channels (email, remote company meetings, etc.) and ensuring that they are successfully set up in the company financial system and benefits/bonus system (where applicable). The HR contact should follow through on any documentation that needs to be signed before Day 1.

Complete Required Documentation

Roles involved:

- Hiring Manager (Name, Contact Info)
- HR Contact (Name, Contact Info)

When preparing a documentation package, the items should be sent to the new employee at least 3 weeks prior to Day 1 to ensure they have time to complete them and send them back.

This creates a sense of comfort and stability, knowing the documentation has been signed ahead of time. Some of this paperwork must be completed before other steps in the process.

Items to consider for this documentation package:

- Employment contract, including salary and start date
- Paperwork for payroll and other systems (automated deposit info, etc.)
- Non-disclosure agreement
- Security checks

Send a Company Gift or Welcome Gesture

Showing your new employee that they are welcome and that their manager/team is looking forward to working with them creates a comforting environment, especially for remote workers. Some suggestions for these small gestures from the HR Department could include:

- Gift basket sent to their home prior to Day 1
- Company swag bag with branded office supplies (pens, notepads, coffee mug, jacket or sweater, etc.)
- A welcome card signed by their new co-workers or teammates

Logistical/Technical Responsibilities

Onboarding roles involved:

- Hiring Manager (Name, Contact Info)
- IT Contact (Name, Contact Info)
- Office Manager (Name, Contact Info)

The company IT department should verify that they have stock on hand to set up a new employee, and if not, should begin the ordering process. It may require up to 4 weeks before the employment start date for the employee to receive a laptop or other equipment. The IT role ensures the new employee is provided with all of the required equipment.

It's important to get the logistical portion of the onboarding process right from the beginning. It can make the first few days of employment pleasant, or it can turn it into an exercise in frustration.

Workstation

Each company will have a different checklist of items that needs to be configured on the laptop to allow for things like access to the company network (VPN), proper software loaded for the employee to do perform their job tasks, security settings, etc. This checklist should already be established by the IT department (and if not, consider creating one). Creating this list is beyond the scope of this document, but here are several things to consider when sending hardware to a remote worker:

- **Test, Test, Test!** – There is nothing worse for a new employee than receiving a faulty workstation when working remotely. Ensure that a proper testing protocol has been followed and that there is a signed document indicating those testing steps have been completed.
- **Instruction Email** – The IT representative should send an email to the new employee with any pertinent information about their new workstation and to make sure they have everything they need week one.

Additional Items

Review the following list to determine if other items need to be provided, either hardware or information:

- Will the employee be using a company phone?
- Do they need a security token to access company resources remotely?
- Has a new email address been created for the employee?
- Has a network account been created, and temporary credentials provided?
- Has the employee been added to the necessary security/application groups?
- Have all the necessary cables been provided for the new workstation?
- If the workstation is a laptop, has a docking station and extra battery been provided?

Pre-Employment Checklist

At Least 3 Weeks Prior to Start Date

HR Responsibilities

- ☐ Duplicate the check-list template, send to process owners to personalize, and assign unassigned tasks
- ☐ Prepare employment contract, including salary and start-date
- ☐ Complete paperwork for payroll and other systems
- ☐ Add new hire to any company-wide meetings
- ☐ Send paperwork and anything relevant they can review before their first day
- ☐ Send general information about the company (brand video), share the excitement, directions on how to park and access the building (if applicable), etc.
- ☐ Have all process owners complete tasks before arrival for setup
- ☐ Update orientation deck if needed
- ☐ Set up initial meetings (HR check-ins, department meet and greets etc.)

Hiring Manager Responsibilities

- ☐ Manager to set-up meetings for first-day agenda and first week as appropriate and available
- ☐ Manager to assign a buddy and send the buddy guidelines
- ☐ Manager to send an email prior to the new employee's start to all relevant employees to include: start date, announcing his/her arrival and a little information about the new team member – encourage people to interact with the new hire within the first week and be friendly/helpful
- ☐ Manager to select files for additional review on own time throughout the first two weeks (include box links in employee orientation checklist)

- ❑ Manager to determine first social experience for the employee (all-staff meeting, team happy hour, trivia, etc.)
- ❑ Manager to set up first week meetings (team lunch, welcome, manager check-ins, department meet and greets etc.)
- ❑ Manager to confirm with team members opportunities for Week 1-2 peer shadow and meeting observation

Logistical/Technical Responsibilities

- ❑ Confirm that the IT Role has a company checklist to follow and that it is initiated

Day 0 Checklist

- ❑ HR to send a warm welcome email to the new employee and cc manager:
 - ❑ Include Day 1 or Week 1 agenda
 - ❑ Attach employee handbook
 - ❑ Link brand video
 - ❑ Attach documents that need to be completed by an employee to submit Day 1
- ❑ HR to send swag bag, welcome card/video from team members and/or letter from CEO, along with first week agenda, employee directory, org chart
- ❑ Manager to schedule first-day department virtual meet and greet with team members
- ❑ HR to set up introduction virtual meetings with different departments
- ❑ Manager to send an email on the first project with any relevant links for review on Day 1 (individual activity), new hire to be onboarded into project work starting Day 2 (with peer)

The First Week Overview

The first week is essential to ensuring that an employee feels like they made the right choice in joining your organization. It is also an opportunity for the employer to adequately share company values and culture with a new employee, setting them up for success in the months to come. Since [1/3 of employee attrition](#) happens within the first 90 days, it's important to provide up front effort to keep retention numbers up. The first week should not be measured by productivity but measured by human connection and accurate expectation setting.

New employees should be given the chance to interact with a diverse set of employees across the organization and start to form formal and informal relationships. By the end of the first two weeks, they should have a better grasp of company culture and work expectations. The following chart breaks out a recommended list of items for each day, along with a Week 1 template for the employee that the manager and HR representative should adjust to fit your organization.

	DAY 1		DAY 2		DAY 3		DAY 4		DAY 5	
	ITEM	ATTENDEES	ITEM	ATTENDEES	ITEM	ATTENDEES	ITEM	ATTENDEES	ITEM	ATTENDEES
MORNING	Welcome! Employee to review provided materials and calendar	New hire	Manager check-in Discuss role, org structure and expectations	New hire + Manager	Review company benefits, perks, and required paperwork	New hire + HR	Admin overview As appropriate, i.e. expense process	New hire + Trainer	Employee work time	New hire
	Department meet-and-greet	Department	Employee work time	New hire	Employee work time	New hire	Systems Overview (ex. Dropbox)	New hire + Trainer	Meeting observation	New hire + Team
	Meet your buddy	New hire + Buddy	Employee work time	New hire	External department informational meeting	New hire + Peer	Peer shadow	New hire + Peer	Manager check-in	New hire + Manager
	Employee work time	New hire	Industry overview	New hire + Peer	Systems overview (ex. Dropbox)	New hire + IT	Employee work time	New hire	Employee work time	New hire
	Lunch Break	New hire	Lunch Break	New hire	Lunch Break	New hire	Lunch Break	New hire	Lunch Break	New hire
AFTERNOON	Review project links	New hire	Project work onboarding	New hire + Peer	Buddy check-in	New hire + Buddy	Employee work time	New hire	Project work onboarding	New hire + Peer
	Orientation deck review	New hire + HR	Employee work time	New hire	Employee work time	New hire	External department informational meeting	New hire + Peer	External department informational meeting	New hire + Peer
	Employee work time	New hire	Meeting observation	New hire + Team	Project work onboarding	New hire + Peer	Special program overview	New hire + Peer	HR check-in	New hire + HR
	Manager check-in	New hire + Manager	Employee work time	New hire	Meeting observation	New hire + Team	Meeting observation	New hire + Team	Employee work time or department zoom happy hour	New hire + Team
ONGOING WORK	Review Employee Handbook		Online Trainings		Review "helpful links" from Manager and HR		Research Clients or Review Project Work		Review Company Website and Case Studies	

Providing a clear agenda will allow the employee to understand what is to come and ease nerves going into the first few weeks. It's important to start setting proper expectations starting day one. Research shows a [54% higher employee engagement](#) among employees who went through a structured onboarding process and 70% higher productivity.

During the first couple of weeks, the manager should also walk through company strategy, business objectives, and team ops plans and goals to let the new hire understand where he or she fits.

You will see 'employee work time' designated for the employee in the employee-facing template. This is intentional, allowing the employee to decompress and internalize information in their own way. It's important to have a mixture of active meetings, passive meetings (shadow sessions), and individual work time to appeal to different work styles without sacrificing the employee's acculturation to the company.

In the first manager meeting, the manager should set expectations about individual work time as appropriate. This can look different for each company, but the 'ongoing' items in the template can be used as a guide for this time along with reviewing information or work that has been presented to the employee in other meetings. **It is also important to understand that how this time is spent will vary depending on employee work styles. This is not 'free time' but should not be a dictated structure forcing the employee to feel that they cannot have their own way of working.**

It takes a village. The work of onboarding an employee should not only reside in the hands of the hiring manager and HR representative. It should be a conscious effort across the department and organization. Throughout this section, you will see a few roles that have previously been defined. These are placeholder titles that can be adjusted to reflect your

organization's structure. The important thing is that an employee feels welcomed and incorporated early on. Outside of that immediate impact, sharing onboarding responsibilities spreads out responsibilities so that it doesn't feel like such a burden as [69% of managers](#) describe onboarding to be too time-consuming.

Peer: these peers will vary based on your organization. This can be a trainer, a department manager or a program or initiative ambassador. The employees selected for these interactions should understand that the meeting should be both personable and informational – encouraging bonds early on paired with training.

External informational department meetings: these meetings allow the employee to get to know people and how their role fits into departments outside of their own. It's important that an employee feels like they are an important part of their team, but also that they are part of the organization as a whole. Establishing these meetings early will help establish a collaborative mindset for the employee.

Meeting observations: these meetings should already be on the books to discuss ongoing project work. This is an opportunity for the new employee to observe how others work, to meet more people, and to start to understand the work more fully.

The First Week Checklist

Day 1 Checklist

- ☐ The manager gives the new hire time to settle, log into computer and email system, read the welcome card or email, and go through the swag bag
- ☐ Department meet and greet. This break should be focused on soft introductions to team members and getting-to-know-yous. The manager should be included and the calendar/invites should be sent in pre-start. Depending on the culture and budget of the team, you can use this opportunity to send your employees a treat. Other ideas might include:
 - ☐ Playing a game
 - ☐ Show and tell
 - ☐ Share working styles and communication preferences
- ☐ Buddy to connect with new hire
 - ☐ Short introduction meeting to get to know each other better
 - ☐ Answer any questions the employee might have about their first week
- ☐ HR to walk through the orientation deck
 - ☐ Company history
 - ☐ Mission, vision, values
 - ☐ Org chart
 - ☐ Department overviews
 - ☐ Workplace rules and expectations
- ☐ Employee to sign and submit HR payroll forms that were sent ahead and are required by law on Day 1. All others wait until Day 3 (NDAs, etc.).

- ☐ Manager Check-in
 - ☐ How was your first day? Can I answer any questions?
- ☐ Manager to select meetings for observation and invite new hire for the week (if not done before starting)

Day 2 Checklist

- ☐ Manager to meet with the employee to review job and expectations
 - ☐ Describe what a typical day might look like
 - ☐ Describe in more detail what the employee will be doing
 - ☐ Explain the norms and unwritten rules/values that the team has developed which contributed to shaping their communication and leadership style
 - ☐ Provide details on who the employee will work with every day
 - ☐ Describe the full reporting structure (share org chart)
 - ☐ Share upcoming checkpoint timeline and expectations (bi-weekly check-ins, monthly, 6 month, performance review, etc.)
 - ☐ Ask the employee to set up regular one-on-ones based on the preference of manager and employee if not done so already by manager (weekly, bi-weekly)
- ☐ Assigned peer to give an industry overview if applicable – peer will need guidelines for consistency (predetermined by the manager and scheduled before Day 2)
- ☐ Assigned peer meeting for initial project onboarding meetings/knowledge transfer/handoff (predetermined by the manager and scheduled before Day 2)
- ☐ Meeting observation (predetermined by the manager and scheduled before Day 2)

Day 3 Checklist

- ☐ HR to review company benefits and perks and complete any required paperwork
- ☐ Project onboarding continued
- ☐ IT systems overview
- ☐ Buddy check-in
- ☐ Meeting observation (predetermined by the manager and scheduled before Day 3)
- ☐ External informational department meeting

Day 4 Checklist

- ☐ Send an afternoon treat to the employee
- ☐ Assigned trainers to give a relevant overviews (set up by HR or Manager scheduled by priority of each position requirements)
- ☐ Peer shadow (1 hour)
- ☐ Meeting observation (predetermined by the manager and scheduled before Day 4)
- ☐ External informational department meeting

Day 5 Checklist

- ☐ Manager check-in, discuss thoughts about the first week
- ☐ HR first week check-in, talk about thoughts and opportunities for Week 2
 - ☐ What has been helpful? What's been less helpful? Anything needed or missing?
This is designed to be informal, to help future onboarding.
- ☐ External informational department meeting
- ☐ Meeting observation (predetermined by the manager and scheduled before Day 5)
- ☐ Project onboarding continued
- ☐ Fill out a short questionnaire to measure how much psychological safety and trust the new hire has developed in their first week. This short questionnaire should be sent out to the new hire every week, for at least the first six weeks, to track progress and measure the effectiveness of onboarding meetings.

The First Month Overview

At the start of the second week, the employee should begin to feel fairly comfortable in their new role with the company. They are fully aware of the company's values and are starting to become familiar with the company culture. They have had a chance to meet everyone they work with directly and have started to create relationships with other members of the team. The new employee should understand expectations, which will be reinforced and updated over the next few weeks by the manager.

By the end of the first month, the employee should be almost fully self-sufficient, able to accomplish most tasks with little or no help or direction from others. A deliverable or a tangible goal should be set early, so it can be reviewed at the end of the month. The level of complexity or difficulty of the task should be set based on the employee's experience and knowledge level.

Along with performance goals, it is important to continue to establish fit within the team and the company. Fit not only means that the employee feels part of the team, but also that other members of the team feel that the new employee fits as well. It is important that management leads by example and is involved in fostering communication with the new employee and other team members to encourage more personal interactions. When working remotely, there is no chance for employees to have a 'water cooler' talk.

Based on employee check-ins, the manager should set up additional meetings as-needed for observation and should review peer shadow opportunities.

The following is a week-to-week checklist for the second to fourth week

The First Month Checklist

Week 2 Checklist

- ☐ What is a tangible deliverable or goal that the employee can accomplish by the end of 4 weeks?
 - ☐ Work with the new employee to determine a deliverable or goal
 - ☐ Ensure that the complexity and difficulty is appropriate to the skill and experience level
 - ☐ Senior employees should have some of their own ideas on this
 - ☐ Ensure that the deliverable is documented and written down and that the employee is accountable for its scope and timeline
- ☐ Ensure that that employee is aware of the company values and goals
- ☐ Work with HR or social team to set up social video calls with the team
 - ☐ Not all activities are suitable or attractive for all teams; work with your new employee and team members to determine what remote activities are preferred
 - ☐ Smaller gatherings (3-6 people) typically allow for better engagement when video conferencing.
- ☐ Set up a time to talk with the buddy to review employee fit so far
- ☐ Review any training or skill acquisition necessary for the position
- ☐ Ensure that meetings with the new employee are scheduled for Week 3 and Week 4

Week 3 Checklist

- ☐ Meet with other team members to get a sense of fit with the new employee
- ☐ If there are other people from the company that the employee should meet, this would be a good time to set up those meet and greets. It may include more senior executives, like the CEO or people from other departments.
- ☐ Focus on meeting team members, completing readings, and project onboarding
- ☐ Employee to fill out the Personal Goal Setting Form: which should cover questions such as:
 - ☐ What are your personal values and how do you live by them?
 - ☐ How are you aligning your personal values to ABC Company values?
 - ☐ What is your ultimate career goal?
 - ☐ What is your goal at ABC Company?
 - ☐ How will your work at ABC Company be aligned with your ultimate career goal?

Week 4 Checklist

- ☐ Make sure the employee has gotten a chance to meet everyone
 - ☐ A video call for with webcams turned on is ideal for this
 - ☐ Include everyone in the department or team
 - ☐ Invite appropriate members of other teams (this can be a separate meeting)

- ☐ If possible, a member of the senior leadership team (e.g., the CEO) should meet with the employee
 - ☐ Give them info about the employee
 - ☐ Tell them the employee's role
 - ☐ Possibly provide an agenda and suggested length of the call
- ☐ All HR tasks should be completed by this time
- ☐ Hold a meeting with the employee to review the work they have done and how they have performed based on the deliverable or goal assigned at the Week 2 point
- ☐ Complete a review of the employee's goals and how they align with the company's goals
- ☐ Facilitate any additional training or skill acquisition necessary
- ☐ Here are some means to evaluate whether the employee is fitting into the organization:
 - ☐ How many times does the person ask for help?
 - ☐ How many people have they interacted with?
 - ☐ Can we measure 'psychological safety'?
 - ☐ Can we measure how comfortable the employee is? Sense of belonging?
 - ☐ Has the new employee made a contribution?

By the end of Week 4, the employee should have met one-on-one with everyone in the department, either as a buddy, peer shadow, observation meeting, or specific project review. The employee should initiate these meetings (other than the ones pre-scheduled by manager/HR in the first weeks).

- ☐ HR to confirm security training and reading is complete (harassment, evacuation, etc.)
- ☐ IT check-in to make sure they don't need anything additional installed or downloaded
- ☐ HR onboarding survey or interview
- ☐ Manager to provide feedback on performance and fit
- ☐ Manager to schedule additional training to help new hire succeed
- ☐ HR to welcome new hire at all-staff meeting

The First Year Overview

The first month serves as a sort of "honeymoon" period, but after the first month, the onboarding process is not over – it will continue through the new employee's first year.

At the end of the first month, the manager should schedule 60 and 90-Day check-ins. The HR role should conduct "stay" interviews at 30 and 90 days.

Probation period

Probation periods will vary according to job function and company policy. By the end of the probation period, the new employee should be able to use all the main tools (hardware, and software) and understand the business processes.

The First Year Checklist

60-Day Checklist

- ☐ Manager check-in
- ☐ Share employee development tasks (to continue goal-setting, etc.)
- ☐ Manager to receive and give regular feedback
- ☐ Discuss communication styles and preferences
- ☐ HR stay interview

90-Day Checklist

- ☐ Goal-setting with Manager
- ☐ Receive and give regular feedback
- ☐ Complete all systems training and basic training
- ☐ New employee survey
- ☐ End of Probation – formal check-in
- ☐ HR check-in for benefits set up

Part 3: Best Practices, Templates, and Resources

We have assembled the following collection of useful tools to help you with the onboarding process, including best practices, templates and resources.

Remote Onboarding Best Practices

Psychological Safety

As a hiring manager who is onboarding a new employee, it's important to remember that everyone needs the following opportunities:

- To feel included
- Feel comfortable to learn/fail
- Feel comfortable to contribute
- To challenge the status quo

<https://www.leaderfactor.com/the4stagesofpsychologicalsafety>

<https://medium.com/@mcleanonline/measuring-psychological-safety-81dd1da91915>

- Make the new employee feel safe
- Inform team members on how to be inclusive. Provide templates for the interactions.
 - The interactions continue to be important, even after the 30-day mark. It is a continuous responsibility; don't assume someone else is doing it.
- Schedule more interactions
 - Without a watercooler, you need to be intentional about alternatives
 - Have more informal interaction
 - Manufacture interactions, be deliberate
 - In a remote setting, you can't rely on ad hoc interactions, some need to be intentionally scheduled
- Lots of encouragement
 - Prove to the employee that they are valued, show them that the company has a commitment to the relationship
 - Provide a career path: "This is where we see you in 6 months."
- Help establish career mentorships outside of the direct manager-employee relationship as appropriate. These relationships can encourage even more growth and feel a bit more relaxed.

Meetings

- When you schedule a meeting, be explicit about the format of the meeting (e.g. video call, voice call, etc)

- Be clear about your expectations for office setup, clutter, background noise, etc. In most organizations, some chaos in the background is acceptable
- Avoid scheduling last-minute meetings with no agenda

Importance of Written Communication

- Whenever possible, remote managers should communicate messages in a written format, in addition to discussing over video or voice call
- In remote settings, non-verbal cues may be missed during voice or video calls, so it is useful to send a follow-up message which contains the essential message and clear action items or next steps
- Although this may take more time, it ultimately saves more time in the long run by reducing miscommunication

Relationship-Building

- Building relationships takes time, whether in person or through online channels.
- When you are unable to meet in person, building relationships can often take more time and effort, so be prepared to invest extra time and energy into getting to know your remote employees.
- It requires being deliberate in communications. You have to create/manufacture opportunities to talk.
- Similarly, you can't assume things are going well. No news is not necessarily good news. Take the time to ask direct questions and wait for answers. Be explicit with your intentions and your messages.
- When in doubt, it is better to communicate more than less.
- Maintain open dialogue, not only about business.

Resources

We have assembled a number of useful resources to help you better understand the onboarding process and develop your company's specific guidelines and procedures.

The "Buddy" Role

- Some organizations have reported a [97% increase in productivity](https://www.nyu.edu/content/dam/nyu/hr/documents/managerguides/BuddyGuidelines.pdf) among employees that were assigned an "onboarding buddy."
 - <https://www.nyu.edu/content/dam/nyu/hr/documents/managerguides/BuddyGuidelines.pdf>
 - https://www.hr.com/en/communities/training_and_development/designing-a-buddy-program_eacwm5gu.html

Additional Resources

- If you would like to leverage technology to increase efficiency of your onboarding process, you can learn more about it here;
<https://www.talentlyft.com/en/blog/article/179/top-7-employee-onboarding-tools>
- New employee onboarding – psychological contracts and ethical perspectives:
<https://www.emerald.com/insight/content/doi/10.1108/JMD-10-2016-0202/full/html>
- New Employee Onboarding Programs and Person-Organization Fit: An Examination of Socialization Tactics: https://digitalcommons.uri.edu/lrc_paper_series/24/
- 7 Steps to Smart Onboarding for Introverts
<https://www.psychologytoday.com/ca/blog/self-promotion-introverts/201909/7-steps-smart-onboarding-introverts>
- How to Use Robert Cialdini's "Pre-Suasion" in Onboarding
<https://www.psychologytoday.com/ca/blog/quantum-leaps/201908/how-use-robert-cialdinis-pre-suasion-in-onboarding>
- Onboarding With STEPS:
<https://www.mindtools.com/community/pages/article/onboarding-with-STEPS.php>
- The psychology of onboarding:
<https://www.onboardinggroup.com/insights/blog/the-psychology-of-onboarding-part-1/>