JazzHR™

The Ultimate Guide to Onboarding Remote Employees

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Recently, remote work became the 'new normal' for thousands of businesses and employees. Some were prepared, others weren't. Now that organizations have had the opportunity to catch their breath, a remote-working future is starting to look more and more appealing.

A survey conducted in April 2020 found that more than 42 percent of full-time employees in America wanted to continue working remotely after lockdown, and that 20 percent of businesses were exploring options for sustained remote employment.

The Google Trends report for people searching 'remote work' backs these numbers up. There was a predictable spike in March, but the interest has remained higher than it was before lockdown:
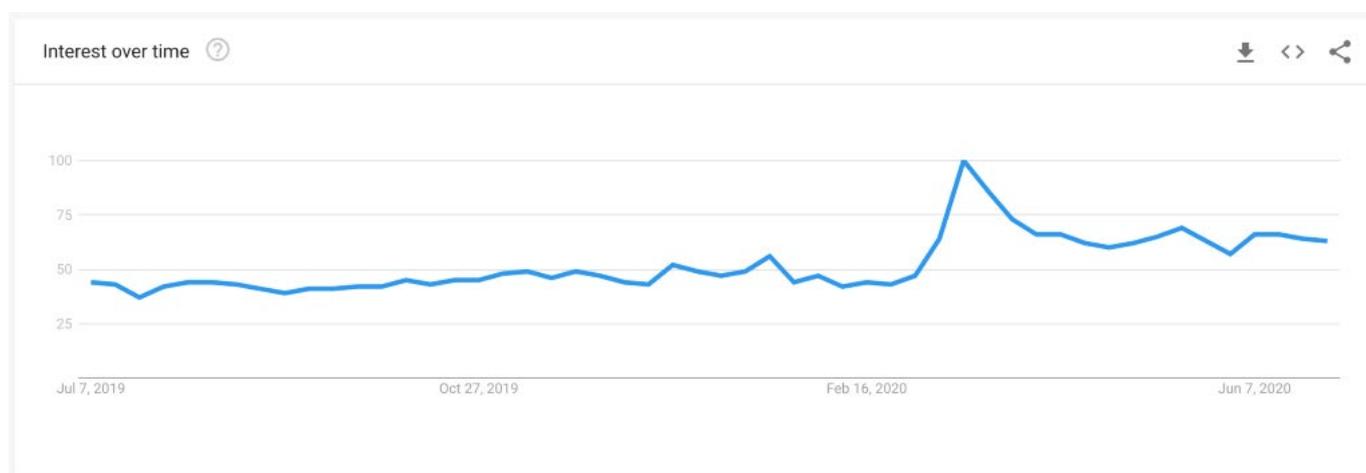
With interest in continuing remotely higher than ever, it's critical for businesses to begin planning for digitizing their employee lifecycle. This starts with employee onboarding. For remote employees, this process is arguably even more important than in-person. In fact, a Harvard Business Review study found that remote staff were less engaged and thought about quitting more than their in-office counterparts. These kinds of studies make it clear that telecommuters require a different set of onboarding strategies.

Here's how to onboard remote employees with engagement and retention in mind.

Prepare your process

Above all else, it's crucial to have a process in place before new employees are welcomed. This doesn't just prevent confusion – it reduces the chance for legal documentation to get in the way of a successful hiring process. Plan ahead, and you'll make it clear that remote staff aren't an afterthought at your organization, but a priority.

Organize your resources

If, like many businesses, you have internal resources like employee handbooks, policy summaries and FAQs, make sure they're all in one place. A company intranet is the best way to do this because it provides a secure but accessible resource bank.

New hires may not feel comfortable asking what seem like 'obvious' questions, so it's a good idea to have a central location that answers their questions. This is especially useful if remote workers are in different time zones, and need answers round-the-clock.

Be sure to add a collection of remote-specific resources on your intranet. This should include things like:

- Your company's telecommuting policy;
- a remote employee handbook (if you have one); and
- a collection of wellbeing resources targeted at people working from home.

This is another way to make it clear that remote staff are treated with the same level of care as their in-office peers.

For a full guide to building a remote work policy, click here.

Create a remote onboarding task list

Formalize your onboarding process with a project management software and use it to set up a templated series of tasks that all new hires should complete when they join the company. That way, you'll have a ready-made plan that can be reused whenever someone new joins the business. You won't be making it up as you go along, and you won't forget anything crucial.

Standardizing the onboarding process is especially important in a remote environment. Having a set series of tasks allows you to track and monitor new hires as they move through the process. If they have questions about any of the tasks, make it clear that they can either comment in the software itself or contact their buddy (more on that later). This is also a great way to get new hires used to your approach to project management.

Sam Rahbar, the director of talent acquisition for recruitment experts TalentMinded, emphasized the importance of communicating what is expected of new remote hires as they move through this process:

> *When it comes to onboarding remote employees, there is no such thing as overcommunication! It is imperative that you schedule frequent touch points throughout onboarding and beyond, until you are fully confident that your new team member is up and running.*

"

What tasks should you include?

Your onboarding task list will differ depending on your industry and the requirements of the role, but it's a good idea to include the following basics:

- Establish communication channels (instant messaging, email, video conference software).
- Introduce new hires to their 'buddies'.
- Ensure remote hires have access to a good internet connection and the hardware they'll need (laptops, webcams, etc.) to communicate remotely.
- Set up/download any further tools needed for the role and provide training.
- Fill out any legal documents (see the section entitled 'Paperwork').
- Conduct an orientation call with HR.
- Ensure that the new hire has read and understood relevant policies/employee handbooks.
- Schedule a 'meet the team' call for the first week.
- Schedule a series of check-up calls (one at the end of the first day, week, month, etc.)
- Organize a social call with teammates, buddies, managers or even members of the C-Suite.
- Create a series of 'milestone' tasks relevant to the role (i.e. 'first client call by the end of week two'. These steps should be acknowledged and celebrated when it goes well).
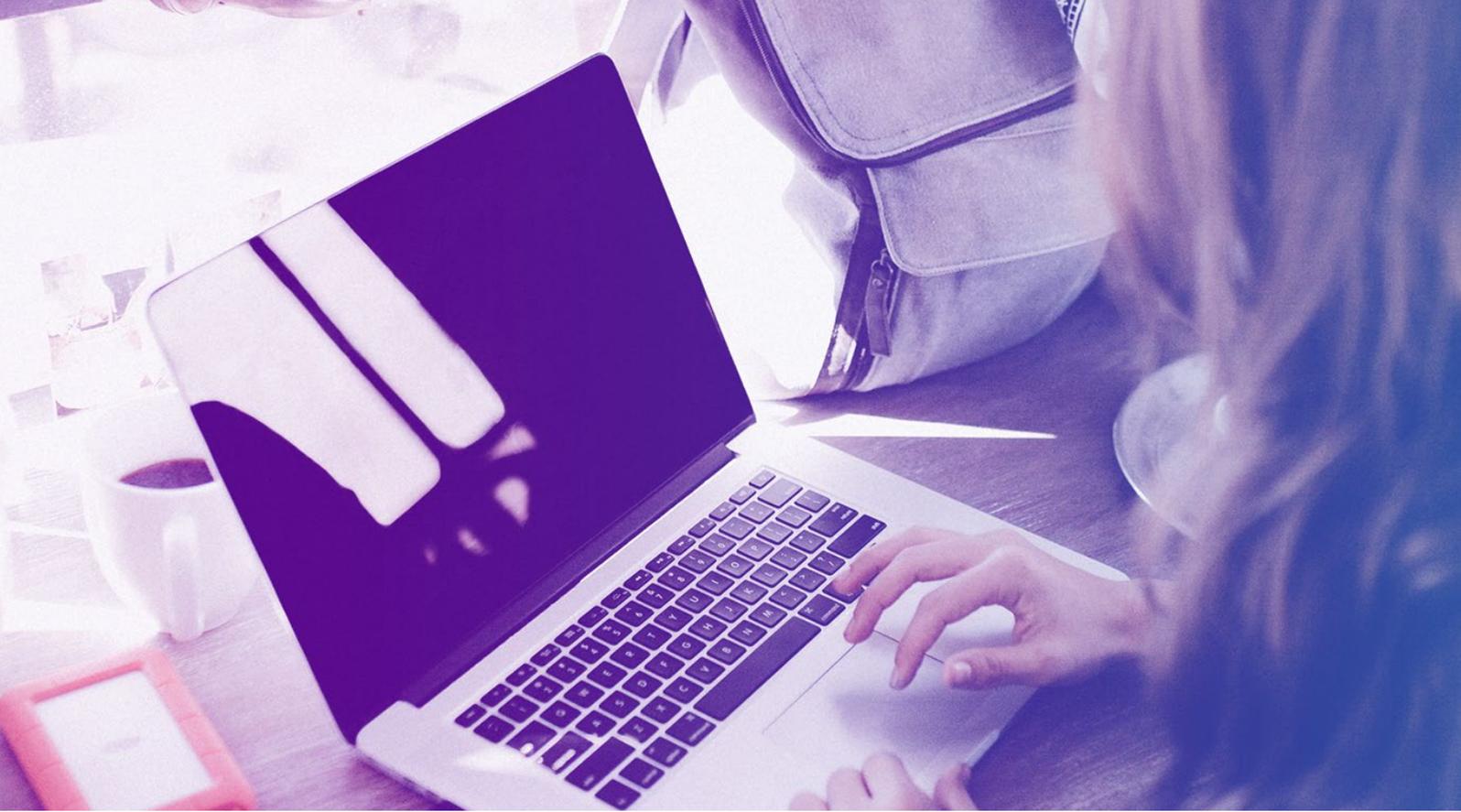
While onboarding should be front of mind for the first few weeks, it shouldn't end there. Once the broader templated process is complete, you'll have a better idea of your employee's individual needs.

From here, you can tailor ongoing goals in the same project management track, which acts as a constant reminder that you're invested in their professional development.

Choose a virtual 'buddy'

The 'buddy' system – designating a specific point-of-contact within the business to help new hires settle in – works even in a remote environment. An internal survey at Microsoft found that the more new employees met with their buddies, the more productive and satisfied they were.

It's a simple enough step to take, but it's worth doing ahead of time, especially with remote hires. Give it some real thought, and choose a staff member that has expressed interest, enthusiasm, or seems like they'd be a good personality fit. If they're a remote worker themselves, that's even better!

Buddies act as facilitators and should be given the time or deadline flexibility to adequately welcome a new hire. That means regular virtual check-in calls, a first-day remote 'lunch' and invites to remote happy hours. If you can share resources to let new mentors prepare for the task, do so! Here's a useful place to start.

Encourage these internal mentors to introduce new staff to people throughout the business, not just to those colleagues they'll work with on a daily basis. Video calls with colleagues across the board can easily be arranged by mentors. It's a small time investment to help new hires feel like they're being involved across the board, no matter where they are in the world. The first few weeks are a fantastic opportunity to meet people in different departments, and to start engaging in the social side of the business (see the section entitled 'Communicating culture'). Buddies are your best way to make this happen.
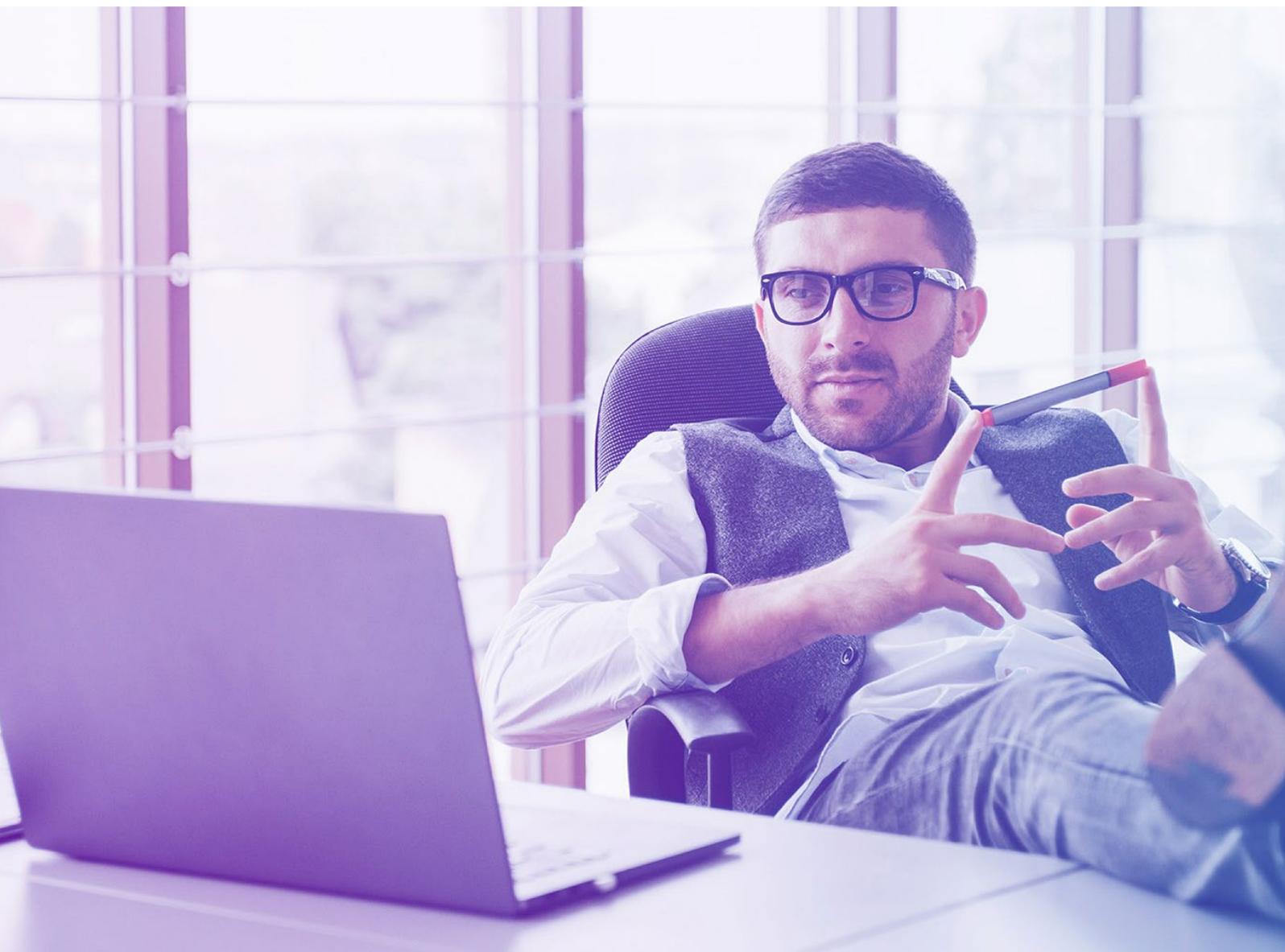
Get in touch

Once you have a plan in place (and a new hire to welcome), establishing communication should be at the top of your list. Strong communication makes the rest of the onboarding process possible and is absolutely critical for a successful remote experience.

Communication tools

If you're welcoming a remote worker, chances are you've already got a full suite of communication tools in use. There are four pillars of workplace communication that your business should have covered:

- **Email**: We're guessing you have this covered!
- **Instant messaging**: Whether it's Slack, Microsoft Teams, or free alternative Chanty, IM is a must for quick, casual communication.
- **Video conferencing**: Something like Zoom, Google Meet or Skype will sit alongside IM as one of the main channels of remote communication.
- **Project management**: When it comes to assigning tasks remotely and keeping track of progress, tools like Asana, Basecamp or Wrike need to be in use.
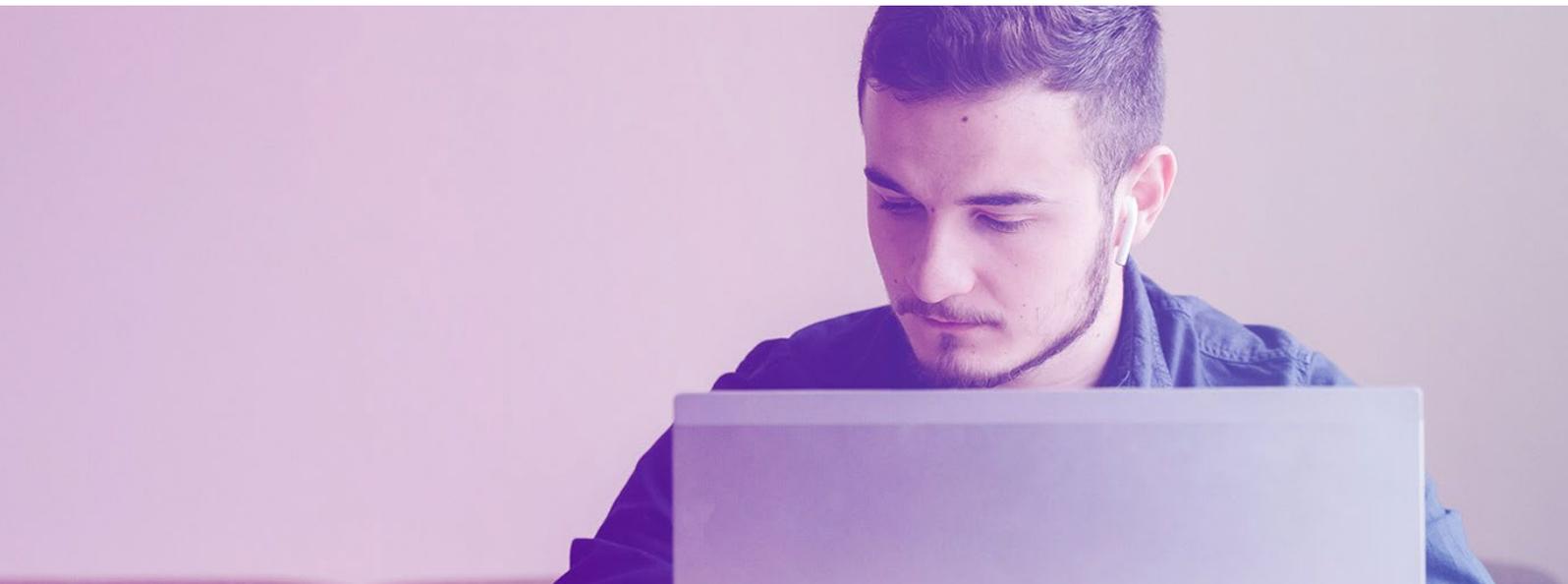
Giving them access to your everyday communication tools will afford new hires an insight into the day-to-day culture of your company. They'll get to see how people at your business talk to one another and can introduce themselves without too many formalities in place.

Ask their buddy to invite them to a social or 'Q&A' call on your video conferencing software, too, so they get a chance to experiment with it before the 'real' calls begin.

Schedule recurring check-ins

Checking in with new employees throughout the remote onboarding process is a must. They're not there in person for you to run into in the hallway, so it's vital that they don't fall by the wayside just because they're out of sight. These meetings should be a space for managers or buddies to let the employee know how they're doing, but also for the employee to flag any concerns or questions they might have.

The aforementioned Microsoft survey saw a 41 percent increase in 'speed-to-productivity' when new hires talked to their buddies more than eight times in the first 90 days (versus just one).

While that sounds like a lot, over three months that's just one meeting every eleven days. You can also scale up or down your checkup calls depending on how the new hire is performing in their onboarding journey.

Start by holding one at the end of the first day, then at the end of the first week. Weekly check-ins make sense for the first month but can feel like a bit much beyond that, especially on video conferencing software. Whatever schedule you choose, it's essential that these calls are regular, pre-planned, and that the new hire knows they can request an ad-hoc check-in whenever they want.

Open-door policy

Check-ins and social calls shouldn't be one-way. Make it clear to new hires that they are free – and welcomed – to schedule calls of their own, and to ask for a quick chat whenever they feel they need it.

Build this into the welcome process by showing them how to schedule video conferences of their own on the software you use, and set them a 'schedule a call' task. It may also be a good idea to have some staff members other than their buddy reach out for a virtual meetup. This will make it clear that your company's culture treats communication with an 'open-door' approach, and that employees should always feel that they're able to reach out.

Manage paperwork

Ideally, you'll be able to knock out onboarding paperwork early on in the process. That way, you can continue welcoming your new staff member without the distraction of form-filling, notaries and tax laws.

Filling out the I-9 remotely

The I-9 is the form you've probably been concerned about when hiring remotely. Why? Because it requires that you verify original documents and complete the form in-person, with the new employee, within three days of their start date.

Thankfully, the government has extended deadlines for filling out I-9s during the current crisis, and may continue doing so in the 'new normal'. After re-opening, it'll be necessary for remote workers to get the forms completed with a local notary. As this is a relatively new practice, many notaries will need guidance and reassurance from the employer. Create a guide for notaries and contact them ahead of time to run through the process.

Here's a helpful example from Carnegie Mellon university, and a look at the best practices for filling out I-9s remotely from SHRM.

Contracts, W9s, 1099s and more

Forms like W9s and 1099s can be completed online, so they're fairly easy to tackle. Keep in mind (and tell your new hire) that remote workers file taxes in the state they live in, not the state your business is based in. (Depending on the worker's home state, your business may be expected to pay some tax, as well. It's not directly related to onboarding, but for a full guide to remote work and tax law, check out this useful guide.)

You can now easily create document templates and collect digital signatures for contracts using the right tool, so this step should be a relatively easy one.
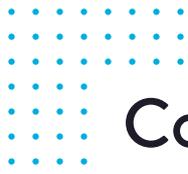
Communicate culture

Remote workers can't be made to feel left out of organizational culture just because they're not in the office. We've mentioned culture a few times throughout this guide, and for good reason. Research has shown that investment in company culture leads to increased engagement, improved retention and higher revenue.

Getting new hires involved in it from the outset is great for the bottom line, but it's also an opportunity to have some fun.

Create a culture document

If you're welcoming a remote worker, chances are you've already got a full suite of communication tools in use. There are four pillars of workplace communication that your business should have covered:

Set up social calls

There's clear evidence that remote staff can become disengaged and less likely to stick around.
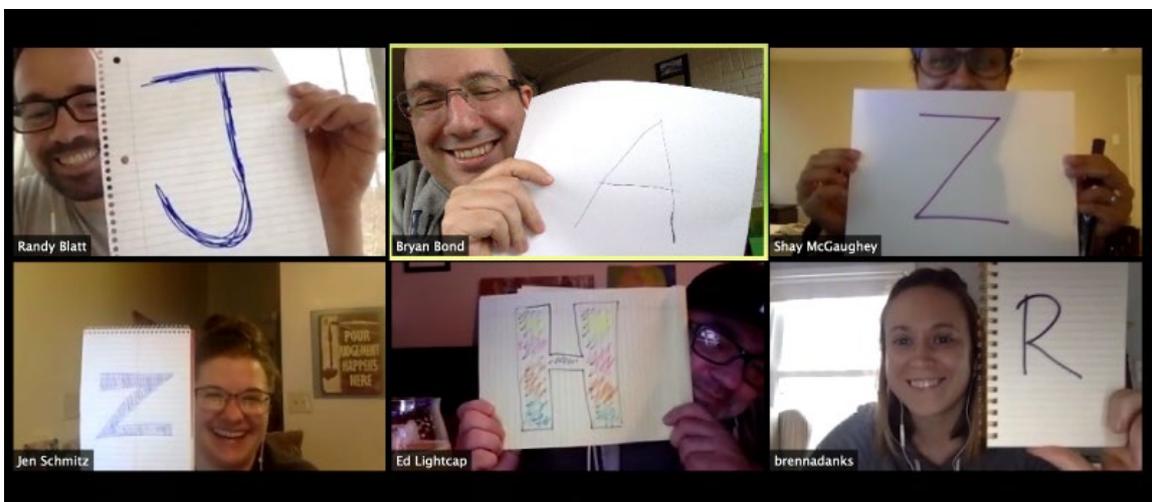
There are plenty of ways to engage with a remote team, as many of us have discovered during the recent lockdown. At JazzHR, for example, we have weekly 'virtual happy hours'. Every Friday, we alternate between informal chats and games to keep in touch with one another. We've even played virtual Jeopardy!

Try something similar at your business, and make sure new hires are encouraged to join in. If they've been set up on your communication channels before their start date, get them chatting with teammates ASAP.

Social life may seem like a non-priority in the remote workplace, but it has a proven knock-on effect on the quality of work and retention. So yes, it impacts the bottom line!

Look beyond the first few months

On-boarding is on-going. New hires don't suddenly become seasoned professionals as soon as the first 30, 60 or 90 days is up. Each employee will develop at a different pace, and it's important to keep this in mind. At the end of your formal onboarding process, schedule a call to talk about how it went, how it's going, and where they'd like to go next.

A thorough onboarding process should evolve naturally into a professional development process. The two go hand-in-hand, and the latter has just as great an impact on retention as the former. Remote staff may not be able to partake in in-person workshops, but there are countless digital training tools online, and the opportunity to hold company-wide virtual workshops. The same themes that guide onboarding (and have been repeated throughout this guide) will carry over, too: **communication, culture, and engagement**.

About JazzHR

JazzHR is powerful, user-friendly and affordable recruiting software built to help growing companies exceed their recruiting goals. JazzHR's best-in-class solution replaces manual, time-consuming hiring tasks with intuitive tools and automation, empowering hiring managers to recruit and hire the right talent faster. To learn more about JazzHR, visit our website.