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The Ultimate Guide to Remote Onboarding

By Amrutha L Murali, CEO of JobFitts Consultants

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2020 has been the year of remote working.

The Coronavirus outbreak has caused the way we live and work to change dramatically. For the organisations that have continued to operate throughout the pandemic, finding virtual solutions to new problems has become a way of life.

Virtual interviews and remote onboarding—both practices which were uncommon before the outbreak — have been adopted by a growing number of organisations.

When building your team, hiring is only half the battle. Proper onboarding techniques must be in place to ensure your new team member integrates successfully — only then will they thrive and add value to your team. Adding the challenge of physical distance into the mix can mean that onboarding remotely might be tricky.

This report is all about virtual onboarding — it contains best practices, common challenges, and at the end, there's a checklist for a fool proof virtual onboarding process.

Remote Onboarding – Standard Practice or Necessity?

With the rise of the internet, the number of people working from home has increased steadily year on year. Roy Morgan reported 32% of Australians are working from home since the COVID-19 lockdown started.

A 2019 survey found that globally, 61% of employers provided their employees with some sort of remote working policy, and a staggering 76% of workers said they would be more loyal to their employers if they had flexible working options.

While for some insurers, current circumstances dictate whether they onboard remotely, for many organisations, it will become standard practice.

IT giant Dell uses remote onboarding as part of its standard hiring process due to a widely dispersed workforce.

“We have all of our onboarding materials in a digital format, including a website, documentation and video. We also have a Day 1 success team that is dedicated to providing support via chat/IM, email and calls during the early part of onboarding,” confirms a spokesperson for Dell.

Online billing software providers Chargify also uses technology to remotely onboard; it schedules Facetime meetings between new employees and managers during the early stages.

The Benefits of an Onboarding Process

Building a high-performing team in the insurance sector is not an easy task. Employee turnover is steadily increasing in many industries and the old rule that you generally stay in a new job for a minimum of two years doesn't apply anymore.

Studies have found that 33% of all new employees quit within their first six months and [86% of participants](#) in one survey said the risk of damaging their CV from moving quickly from a job that wasn't working out wouldn't outweigh their decision to move.

When you find a candidate who is a perfect fit for the role and your company, you must work ever-harder to keep them. Organisations with effective onboarding and induction programs achieve a [50% improvement to new hire retention](#).

Once you have interviewed and decided upon your new employee, it is time to start the virtual onboarding process, starting with getting the contract signed.

The main benefits of a competent onboarding process include:

- **Reduction in the cost of turnover** — businesses spend significant amounts on re-hiring; the real cost of hiring an employee on \$48894 is [actually nearer \\$90545](#)
- **Boost in productivity** — it can take up to eight months for a new employee to get up to speed. A robust onboarding programme can cut this time dramatically
- **A stronger company culture** — it is widely believed that companies with the best cultures fare better in all other areas. Improving your company culture should always be a top priority for you. There is a dedicated section on company culture during onboarding later in this report
- **An improvement to your employer brand** — a positive employer brand is one of the best ways to attract future talent, especially in the age of online reviews.

It is essential to have a tried and tested, robust remote onboarding process if your virtual employees are going to be onboarded successfully. Still, if you are onboarding virtually out of necessity, you will probably lack such a process.



Virtual Contract Signing

Once you've found the individual you want on your team, it's time to get them officially onboard.

As this process usually happens via phone and email, it shouldn't be too different for candidates who have been virtually interviewed. It just means that if you want them to sign their contract before their start date, you will need to invest in some digital contract signing software. Not all employers choose to get contracts signed straight away; some leave it until after the employee's start date. But in light of the Coronavirus and physical workplaces possibly becoming a thing of the past, it's best to get the contract signed as early as possible so as to reassure both you and the employee.

There is a range of different virtual signing software, such as Adobe Sign, Docusign, Pandadoc, HelloSign — shop around and find a package that best suits your needs. Most virtual signing software is legally binding, but it's always good practice to check.

Get candidates to scan their documents such as passports, birth certificates and any other form of ID you require using the free Adobe phone app, Adobe Scan.



Stay In Contact

At this stage, it is essential to keep in close contact with your new employee. If they don't sign their contract straight away, it might be a simple miscommunication, or it might be a sign of something more serious. Keep in regular contact to make sure you and the new employee are on the same page.

Once the new employee has signed their contract and you've confirmed a start date, it's time to start organising their work materials.

Safety First

Educate the new hire on your company's WHS policies and WFH safety responsibilities as you would in an in-person induction. Get your WHS expert to call the employee and answer any questions/concerns they might have. Provide the new hire a [WFH assessment checklist](#).



New employees should be provided with your WFH policy and have the key points of the policy explained to them.

Providing ICT

Before your new employee's start date, it is essential to ensure they have everything they need to hit the ground running in their new role. Nothing halts progress at the start of a position for a new hire more than not having the right tools to do their job.

With this in mind, it is never too early to send out your new hire's equipment — it is far better to have it arrive early than late.

In terms of equipment, you will need to consider if the employee needs:

- **A computer** (laptop or PC and monitor/s — PCs are considered much better in terms of productivity, but you will need to ascertain whether the new person has adequate space and provide a desk)
- **Speakers, headset, webcam, additional USB hub**
- **An ergonomic chair.**
- **Work phone and SIM card**
- **Welcome pack** including company information, an outline of the role, a copy of the contract and all new email, username and password information the new hire will need for their new profiles
- **Stationery**, such as writing pads, pens, empty binders
- **Business collateral** — some organisations include personalised mugs, water bottles or t-shirts which can help the new employee feel integrated into their company's culture.

Tech Connectivity — You must also find out what kind of internet speed and system the employee currently has available. Many domestic broadband providers do not provide the bandwidth necessary for business tasks, especially if the role involves lots of uploading and video conferencing.

Determine the new starter's Wi-fi needs, for example, if they will be using their Wi-fi, is it strong and secure enough to meet the needs of their new role? If not, you will need to supply them with an alternative internet supply such as a modem or a mobile broadband device.



Working Arrangements

At this stage, it is a good idea to discuss your new starters working arrangements. Do they have a dedicated working space or a home office? If it is the first time they will be working from home, they might lack a suitable space. If necessary, offer guidance on what constitutes a good remote working space. Employees will require somewhere quiet with minimal distractions.

Of course, everyone has their working style, and aside from asking if they feel that they have a suitable space, their working style will be something they figure out on their own.

Communicating Your Company Culture in a Virtual Setting

Your company culture is a critical component of what your business stands for and how it operates — it should be key to your company DNA. The term '[cultureboarding](#)' now exists to describe forward-thinking companies who have a significant focus on workplace culture during their onboarding process.

The following are some best practice elements of cultureboarding.

Where possible, talk about a new person's role in future terms, for example, "next year when our new product will be launched, you will be part of the product launch team". This forward language excites the new hire and makes them feel valued.

Also, have a clear communication plan scheduled daily, weekly, fortnightly and so on. Decide who will communicate using which channel, such as video, email, phone call or virtual event.

As a suggestion, plan ahead for HR, IT support, the CEO, department head and peer-support buddy to communicate with new hires.

When thinking about how to demonstrate your company culture to a new employee remotely, here are some points to consider:

- **What does your company culture encompass?**
- **What is in your code of conduct?**
- **Do you have a vision and mission statement?**
- **How involved are senior leaders in the onboarding process?**
- **Do you have certain things that you do daily or weekly, such as lunch meetings, catch-ups, or Friday roundups?**
- **Introduce peers support to communicate company ethos.**

Feeling Welcome and Included

Going forward, make sure that new employees are regularly included — daily is best — on video calls with the colleagues with whom they will be working closest, for at least the first month. These only need to be quick five-minute catchups in the morning, but they will strengthen employee bonds significantly.

Before a new employee's start date, make sure you add them on appropriate social media platforms they need to be connected to for work, such as LinkedIn, or your company Facebook.

Additionally, instant messaging groups such as WhatsApp, Facebook Messenger or Slack can be invaluable to help employees integrate during the early days. These can provide quick answers from colleagues or managers about smaller queries that the new hire might have.

Of course, it will not be feasible for remote employees to physically join in with team lunches but aim to incorporate them as much as you can. Invite them to all team activities to make them feel welcome and included.

Remember to ask a new hire if they are comfortable using their personal social media for work. If not, arrange for them to set up separate work profiles.

Making Use of Tools

If a big part of company culture relies on the camaraderie of the physical office environment, it can be more challenging to get your new hire to feel appropriately integrated.

Time zones allowing, include new employees on video calls with as many of their new colleagues as possible. Of course, this will depend on the size of your organisation. As mentioned, introducing new employees to senior colleagues is extremely important. Failing to do this can lead to a new employee feeling undermined or excluded from your company culture. Aim to introduce new employees via video to as many senior members as possible, and yes, this includes CEOs and MDs.

The most effective way to get around this problem is to make use of video calls – this will be your answer to the remote onboarding challenge.

Finding a Working Compromise

After the induction process and any initial training (which can take anywhere from a few days to a few weeks), an essential part of the onboarding process is to find a compromise between the working style that works for your organisation but also works for the new employee.

During the induction, make sure to have a conversation about the employee's preferred working style. You can establish this during the interview, with the question 'how do you like to be managed?' or similar.

A good way to find out about the employee's preferred working style is to have them complete a 'How I Work' questionnaire.

This survey lets you get to know your employee better, to find out if they are more, or less likely to ask for help, if they prefer working alone to working in groups, etc.

At this stage, the importance of keeping in touch with your employee cannot be overstated, even if they tell you they prefer a hands-off working approach. Once they settle into their new role, you can slip into the working style which suits you both (such as less, or more input from you) but at first, a continual connection is what's needed to form the bonds that create a robust employee-employer relationship.



Key Milestones

Key milestones during your remote employee's new tenure are the first week, the second week, the first month and then subsequent months, usually quarterly. The general consensus from HR professionals is that onboarding should take a minimum of three months and some argue that it can take up to an entire year.

During these milestones, you must keep a record of your new employee's performance, to help them by giving feedback. Next, let's take a look at the importance of consistent reviews during the remote onboarding process.

Reviews During Onboarding

Many organisations shy away from consistent reviewing of their employees for many reasons, including time constraints or a lack of adequately trained management.

But reviews are incredibly beneficial for both employee and employer, who will get a great deal out of an appropriately undertaken process.

Provide your employee with a framework of what their reviews will look like. This should include the questions you are going to ask, such as what aspects of their role they have found to be challenging and what they are enjoying.

It is much more constructive for everyone involved to provide formal reviews rather than giving verbal feedback only. Documenting challenges, goals and outcomes gives the new employee a clear path of what to aim for.

Remember to include a section where the new hire can give their feedback on the remote onboarding process. This part will be invaluable to you for modifying the process so that you can improve it over time.

Appropriate milestones for video reviews are as follows:



Week One

A review at the end of the first week should aim to cover any teething problems that might have arisen, to check that your employee's tools to do their job, are working correctly and for them to ask any questions that have initially cropped up about their role. There will always be something that the employee thinks of that you might have missed, so inviting a two-way conversation at this point is very useful indeed.

Week Two

At the end of week two, hold another review. This time, ensure any problems from week one are fixed, and the employee is more settled within their role.

At this stage, you might expect some feedback about systems and processes, now that the new hire is more familiar with the role.

First Month

The end of the first month will be the first time you get a good idea of how well the employee is doing in their role, the speed at which they are completing tasks and with how much ease.

This review is a good time to have a frank discussion about how you feel the employee is performing in their role and setting out aims and objectives for them for the next three and six months. This review should feel more like a standard annual review and should be longer to reflect this.

The framework for your first-month review should then be used again during subsequent discussions, typically at three-month intervals for the first year. You should track goals and aims so that you can draw up objectives and actions for the employee during their quarterly reviews.

A robust review plan like this should help the employee feel secure, confident and connected in their new role, despite the possible physical distance.

Finally, here is a checklist of everything to consider when virtual onboarding.

Remote Onboarding Checklist

- In the time between the job offer and a new hire's first day, get the contract signed as quickly as possible and check in with them regularly via email or phone calls.
- Get the new employee to email the details you need to add them to payroll, plus copies of their passport, birth certificate and other forms of ID.
- Check with the candidate what collateral, hardware or software they are missing that they need to do their job. Discuss and confirm their preferred work style.
- Arrange and send their laptop or PC, all associated software and hardware via a tracked courier service.
- Get the new employee set up on the necessary systems such as email, Office 365, cloud systems, passwords and logins to relevant systems.
- Add the new employee to WhatsApp/Facebook/Slack or other messaging groups.
- Add the new employee on social media such as LinkedIn, and get their new colleagues to do the same.
- Send induction/welcome pack containing information about the company and branded collateral.
- A couple of days before a new hire's official start date, check with them that everything is ready and they've got everything they need.
- Introduce them to their peer/buddy so they can get acquainted. Plan times for introductions to the new hire's team and senior colleagues
- Set up reminders for video calls for daily and weekly induction check-ins.
- Send and go through with them a document outlining the review process.
- On the first day, conduct a video induction going over the role, duties, expectations and company culture.

This guide and checklist will help your remote onboarding practices going forwards. And remember, remote onboarding does not have to be challenging — it can be simplified when you follow cohesive processes.

Are you looking at ways to reduce your overall costs of recruitment?

Does the information supplied by your current recruitment agency allow you to make better hiring decisions?

Do you find yourself hiring on skills, only to fire on behaviours?

If you have answered yes to any of the above questions, we should talk [Contact Us](#).

Working with JobFitts: What can you expect?

At JobFitts, we understand a new hire is an investment that is carefully planned for with the expectations to meet the needs of the business and contribute positively.

We work with you in identifying your culture. Take ownership of your candidate care. Link your business goals to your hiring strategy and assess potential employees to match your requirements.

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Matthew Purcell, Contact Centre and Resourcing Manager



Amrutha L Murali
CEO of JobFitts Consultants

Since using JobFitts Consultants, Clipsal Australia has grown and taken a positive direction in creating a successful customer service team. The evidence of this is visible in many ways. For example when resourcing new employees, we look for hardworking dedicated people, with the right experience and JobFitts has certainly brought forward the right candidates.

Sue O'shea, Customer Care Manager NSW

Teachers Mutual Bank
We put you first

Since using JobFitts, we have found JobFitts Consultants to be a most professional service, without the 'hard sell' of many other recruitment agencies. Staff at JobFitts are well connected and have good follow through for all candidate placements.

Marco Sicurella, Senior HR Manager

My role is GM of Distribution and we use the service of Amrutha for the majority of our distribution staffing requirements. I find Amrutha very well connected within the finance industry and we have enjoyed a high number of successful hires from colleagues that Amrutha has presented to us. I would highly recommend Amrutha's services for anyone looking for high quality applicants within the Finance Industry.

Mark Hudson, General Manager Distribution

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