



VIRTUAL ONBOARDING PLAN FOR NEW HIRES

SETTING YOUR NEW HIRE UP FOR SUCCESS

Once you extend a job offer, the work of integrating your new hire into the company and your team should begin. With little to no communication between job offer and their first day, your new hire begins to feel uneasy - reach out and continue to have dialogue. Once they arrive, having a well-laid-out onboarding process will make them feel welcome and will allow them to focus on what you hired them to do.

OBJECTIVES

- 01** To positively reinforce the decision that your new hire made when deciding to join your company.
- 02** To provide your new hire with the necessary tools and training to be successful in their role.
- 03** To set clear expectations of your new hire from the very beginning.



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»» Before the New Hire's Start Date

Schedule and Job Duties

- Complete internal paperwork with approvals
- Call them to:
 - Confirm start date, time, virtual needs, etc.
 - Identify computer needs and requirements
 - Provide the name of their onboarding mentor
 - Remind them to complete new hire paperwork
- Add regularly scheduled meetings (e.g. staff and department) to their calendar
- Prepare their calendar for the first month
- Finalize their compensation plan

Socialization

- Send company email informing of the new hire, including start date, their role, and bio
- Select a mentor
- Arrange for first on-site or in person visit
- Plan for the first day and first week introductions
- Virtually meet with their mentor and provide suggestions and tips
- Arrange for a building tour when they visit the office for the first time

Work Environment

- Put together welcome packet from the department and include: job description, welcome letter, organization chart, contact information, mission and values of the company, information on your team, etc.
- Order business cards
- Possibly order welcome package to be sent to employee's home

Technology Access and Related

- Order technology equipment (e.g. laptop, printer) and software
- Contact IT to have the system set up in advance
- Add them to relevant email lists, Google Drive, Slack, HubSpot, etc.



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»» **First Day**

Schedule, Job Duties, and Expectations

- Review 30/60/90 day expectations/document
- Clarify the first week's schedule and confirm required and recommended training
- Review the compensation plan
- Review job description, outline of duties, and expectations
- Describe how the month will unfold, as it relates to travel
- Describe how their job fits in the team, and how the job and their team contribute to the overall company
- Explain policies and procedures for vacation and sick time, holidays, etc. Explain any flexible work policies or procedures

Socialization

- Be available to greet the hire on the first day - virtually
- Introduce the hire to others in the workplace
- Send gift card or UberEats card to enable a virtual lunch
- Provide a list of the employees they should contact and get to know and the timetable within which to do so

Work Environment

- Explain how to get supplies

Technology Access and Related

- Provide information on setting up laptop, printer, software, etc.



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»» **First Week**

Schedule, Job Duties, and Expectations

- Debrief with the new hire after they attend initial meetings and training. Touch base quickly each day
- Explain the annual performance review and goal-setting process
- Begin product training
- Describe group meetings and one-on-one meeting process and cadence
- Review the process related to the probationary period (if applicable)

Socialization

- They should continue to contact the list of employees you provided to get to know them within the timetable provided
- Think of creative ways to socialize with your new hire. TIP: send them a Starbucks gift card and schedule a virtual coffee meeting)

Technology Access and Related

- Ensure the hire has a fully functioning computer and systems access and understands how to use them

»» **First Month**

Schedule, Job Duties, and Expectations

- Schedule and conduct regularly occurring one-on-one meetings
- Continue product training
- Continue to provide timely, ongoing, meaningful "everyday feedback"
- Elicit feedback from the new hire and be available to answer questions
- Explain the performance management process
- Discuss performance and professional development goals

Socialization

- Continue introducing them to key people and make sure they are included in relevant events
- Meet with the new hire and mentor to review the first weeks and answer questions

Training and Development

- Week 2 - Have them attend any external meetings with their manager/mentor
- Week 3 - Co-attend virtual group meetings with the new hire
- Week 4 - Have them conduct external meetings on their own. TIP: follow up and ask for feedback on if they feel they have the tools needed to continue leading external meetings.



»» **First Three Months**

Schedule, Job Duties, and Expectations

- Continue having regularly occurring one-on-one meetings
- Meet for informal three-month performance check-in
- Establish fit within organization and proceed with exit plan if person is deemed not a fit for the organization

Socialization

- Have a check-in with the new hire and mentor. TIP: If you still have not met in person, consider flying the new hire out for further integration into the Company.

Training and Development

- Ask if needed training is completed

»» **First Six Months**

Schedule, Job Duties, and Expectations

- Conduct six-month performance review
- Review progress on performance goals and professional development goals

Socialization

- Meet with the new hire and their mentor at the end of their structured mentor-relationship. Discuss how things went and what else would be helpful for them.



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»» Key Takeaways

It is important to make sure that any relationship starts off on the right foot. Since the first experiences of a new hire are critical, proper onboarding ensures that this relationship starts off as both parties had hoped.

Onboarding is not a static event that ends after one or two weeks and involves only the new hire's manager. It is a process that continues to take place over many months and involves their manager, mentor, key members of other departments, Human Resources, etc.

Make sure you and the new hire are in alignment on the Onboarding Plan. Confirm they have the tools, processes, and resources they need to be successful, and establish how you will work together and communicate effectively to ensure success.

»» Notes