

On-boarding in a virtual world

March 2020

Setting your new team
member up for success

Introduction

The first few weeks of an employee's time with a new company are key in ensuring they settle in well and feel supported by their manager and their team members

As we all work on a remote basis, your role in creating a positive on-boarding experience for your new team member has never been so crucial

This guide has been produced to help you welcome your new team member into your business and consists of a range of practical steps you can take to put them at their ease in their new role

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They're hired! What happens next?

You've shortlisted, interviewed, made the final decision and your chosen candidate has accepted your offer.

You now have some time to ensure that your new team member is fully prepared for the realities of working remotely in their role and are ready to start work on their first day.

These steps outline what will happen next...

Step 1

Your new team member will receive their job offer documents

You may be required to set up your new team member's IT equipment and systems to ensure the equipment can be delivered to their home in time for their first day

Step 2

Contact your new team member to arrange a call to discuss their home working arrangements

This is a great opportunity to make first contact with your new employee

- Take some time to find out about their experience of home working in the past and talk through how you and your team are managing this
- Make them aware that their IT equipment will be sent to them prior to their start date and **confirm the address this should be sent to**
- Ask them to confirm with you when their IT equipment has arrived

Planning the Induction

Employees who receive a comprehensive introduction to the business, their team and their role are more likely to be more productive, more quickly

- What could you do to keep in contact with your new team member prior to their start date?
- How will you welcome your new team member on their first day?
- How will you help them understand their role?
- Who will they need to interact with, and build relationships with?
- How will they meet other members of your team?
- What systems will they need to learn and be familiar with? How will you help them develop this knowledge?
- What plans will you put in place to keep in contact with them?
- Is there an appropriate person who could be their buddy during their first few months?
- Regular communication with your new team member will be critical to their success

Buddies

Introducing a buddy to help a new team member settle in is a useful way of providing on-going support to them, and will help you prioritise the time you need to bring them up-to-speed

What role could a buddy play?

- A go-to person for any queries your new team member has on systems, processes and ways of working
- A person who can keep in regular contact with your new team member, something that is of particular importance for them when starting a role in a remote working environment

Things to bear in mind

Consider the buddy's workload and ensure they have the time to commit to providing support

Ensure both the buddy and your new team member know how long the buddy will provide support for

Make sure the buddy knows what your new team member's role is so they are aware of what they may need to know

Make sure the person you have in mind is keen to help!

An Induction timetable in a virtual world

Prior to start date

- Ensure all is in place for the delivery of IT
- Develop an Induction plan for their first three months
- IT will organise a time on their first day to assist in the set-up of their equipment
- Make your team aware of their new colleague
- Make contact to confirm their start date and time and to arrange a call on their first day
- Consider what work shadowing or training they may require
- Assign a buddy

Day one

- IT set-up call
- One-to-one call with your new team member. Share Induction plan for coming weeks, check IT is working, agree plan for first day. Provide information on their buddy
- Introduce team members. Hold a virtual team meeting by Skype (or similar) with the team using cameras

An Induction timetable in a virtual world

Week one

To-do's	Guidance and further information
<ul style="list-style-type: none">• Arrange any training required for systems and business processes e.g Skype, Fuse, business specific software, holidays, sickness etc.	<ul style="list-style-type: none">• Their buddy or another team member could provide this.
<ul style="list-style-type: none">• Ensure your new team member is aware of any mandatory training they must undertake	<ul style="list-style-type: none">• Training may be assigned to them on their entry into the business.
<ul style="list-style-type: none">• Arrange a time to discuss their job role, your expectations and performance measures both in the short-term as they settle in, and in the longer term.	<ul style="list-style-type: none">• Explain more about your role, the size of the team and how you all fit into the wider business. Use video calling on Skype.
<ul style="list-style-type: none">• Take some time to explain how the team are managing working together on a remote basis.	<ul style="list-style-type: none">• Explain the main tools and approaches the team uses. Consider the introduction of a team charter to establish ways of working.
<ul style="list-style-type: none">• Arrange for either you or another member of your team to check-in <u>at least</u> once every day with your new team member.	<ul style="list-style-type: none">• Encourage use of video calls using Skype/Zoom/Teams.
<ul style="list-style-type: none">• Host a virtual team lunch or social event at the end of the first week.	

An Induction timetable in a virtual world

Months One and Two

To-do's	Guidance and further information
<ul style="list-style-type: none">Company Induction Programme	<ul style="list-style-type: none">If your company holds induction sessions when new members join, find out the dates of upcoming sessions and how to access remotely
<ul style="list-style-type: none">Put in place one-to-one weekly catch-ups for first month and then monthly thereafter as a minimum	<ul style="list-style-type: none">Make the most of the technology by enabling use of cameras when using video conferencing

Month Three and beyond

To-do's	Guidance and further information
Put in place monthly catch-ups as a minimum	Arrange these in advance for the next six months or year
Discuss goal setting and assign goals for the year	
Check that your new starter has completed all mandatory online training	

Induction checklist

This quick checklist will help you keep track of your new team member's first few weeks and months. Read in conjunction with the Induction timetable on pages 7, 8 and 9.

Prior to start	Day One	Week One	Month One and beyond
IT Request form <input type="checkbox"/>	Welcome call <input type="checkbox"/>	Systems training <input type="checkbox"/>	Company Induction <input type="checkbox"/>
Inform team of new starter <input type="checkbox"/>	Introduce team members <input type="checkbox"/>	New joiner mandatory training <input type="checkbox"/>	Regular catch-ups <input type="checkbox"/>
Create Induction Plan <input type="checkbox"/>		Call to discuss job role and expectations <input type="checkbox"/>	Goal setting discussion <input type="checkbox"/>
Confirm start date and time, and call on first day <input type="checkbox"/>		Work shadowing and training <input type="checkbox"/>	Completion of new joiner mandatory training <input type="checkbox"/>
Plan work shadowing and training <input type="checkbox"/>		Daily check-in <input type="checkbox"/>	
Assign a buddy <input type="checkbox"/>		Virtual team lunch / social event <input type="checkbox"/>	

Additional learning offers and resources

‘Every Employee Needs an Onboarding Buddy’

A case study from Microsoft Dawn Klinghoffer, Candice Young, Dave Haspas

<https://hbr.org/2019/06/every-new-employee-needs-an-onboarding-buddy>

Leading From a Distance: Ideas for Supporting Your Remote Workforce in Times of Change

Dr. Gabriella Kellerman, BetterUp’s Chief Innovation Officer

http://www.betterup.com/en-us/resources/blog/leading-from-a-distance-ideas-for-supporting-your-remote-workforce-in-times-of-change?camp=none&utm_medium=OSM&utm_source=LI&utm_campaign=AMS20+-+Remote&utm_term=BL

About us

Howden Employee Benefits & Wellbeing work with clients of all sizes – both in Hong Kong and globally - to provide dedicated employee benefits & wellbeing consultancy. We've won many industry awards for our work and are widely recognised for our innovative and creative approach to benefit design.

We remain committed to supporting clients and the wider HR community during these challenging times. If you want to know more or simply to have a chat about ways you can support your employees, please get in touch with your consultant or contact us:

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