



The Virtual Onboarding Handbook

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WHY ONBOARDING MATTERS

Whether it's a first date or a first day on the job, first impressions matter. Onboarding is your opportunity to set the tone for what those impressions will be. An effective onboarding process boosts productivity, engagement, and retention. When it comes to virtual onboarding, communication and face-to-face interactions with your remote employees are more important than ever.

86%

A study by analyst firm Aberdeen Group found that 86% of respondents felt that a new hire's decision to stay with a company long-term is made within the first six months of employment.

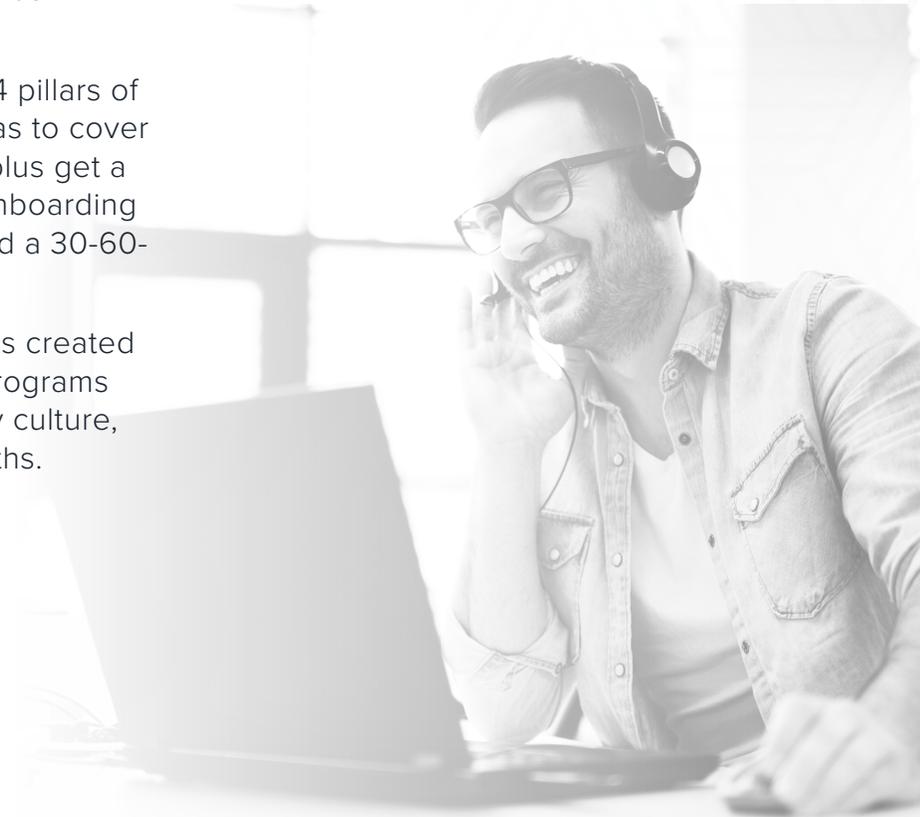
The key to virtual onboarding success?

Having an organized, well-thought out plan ahead of time. The time you invest into strategically weaving onboarding activities among regular work duties as a new hire gets acclimated will pay off in creating engaged employees performing at their full potential as quickly as possible.

In this eBook, you'll learn the 4 pillars of onboarding and key topic areas to cover in your onboarding program, plus get a sample template of a virtual onboarding program, loosely based around a 30-60-90 day structure.

Of course, not all onboarding is created equal. The best onboarding programs are tailored to match company culture, individual roles and career paths.

Customize this sample template to deliver the onboarding that best fits your organization's needs.



ORIENTATION VS ONBOARDING

Orientation:

A one-time event welcoming new hires to your company.

Orientation is often a conference style event, bringing together new hires across the company to introduce the company culture and mission, and deal with all that tedious mandatory new employee paperwork. Orientation covers many of the administrative procedures and compliance requirements necessary before an employee can begin work.

Onboarding:

A series of events designed to help new hires be successful in their day-to-day job and understand how their role contributes to the overall success of the business.

Onboarding requires a more strategic plan than orientation, which often boils down to a simple checklist of to-dos. A complete onboarding process immerses the new hire in their workplace and role, from attending meetings to starter projects and regular check-ins with their new manager.

As the onboarding process continues, the new hire develops a greater understanding of their role and responsibilities, where to find answers to questions, and how to make an impact through their work. For remote workers in particular, a formal onboarding process will help them quickly and successfully connect with their colleagues and their work.

Both of these events are essential to fostering employee engagement and high productivity.



2nd↑

The Boston Consulting Group released a report, **From Capability to Profitability**, which ranked onboarding as having the second highest impact out of all 22 HR Practices, second only to effective recruiting.

TIMING AND MILESTONES

This virtual onboarding plan is structured around a set of milestones—Learn, Build, Do—that naturally align with a 30-60-90 day Onboarding program schedule. The model calls for an incremental progress review (Manager 1:1) at the end of each of each milestone, which is designed to fall roughly at the end of 30, 60, and 90 days.

In practice, adherence to a strict 30-60-90 day program schedule is not a requirement. The length of program milestones can expand or contract depending on the role of the new hire and complexity and demands of their responsibilities. In fact, some experts recommend expanding onboarding incrementally across the full first year. A year-long onboarding model lessens the impact of learning and development time on daily activities, and creates an opportunity for spaced learning with on-the-job practice, feedback, and coaching.

However you space your onboarding program, what matters most is creating a firm foundation from day one and steadily moving through the Learn, Build, Do milestones and activities to increase knowledge, confidence, and productivity.



TIMING AND MILESTONES

Learn

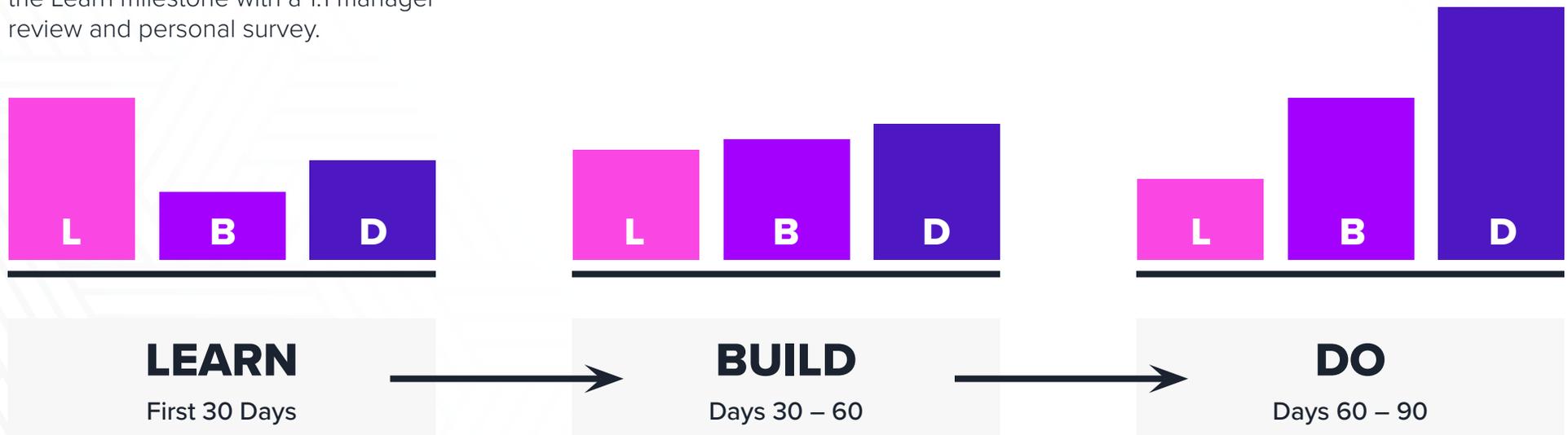
Beyond tackling compliance requirements, the **Learn** phase of the onboarding program relies on heavy coaching and team building. The focus of this milestone is to get to know the workplace, the people, and the work to be done. Learn activities are front-loaded in the onboarding program, but increasingly integrate with regular daily work activities as the new hire becomes acclimated. As a best practice, consider using assessments to customize the program to the specific role and career path of the new hire. End the Learn milestone with a 1:1 manager review and personal survey.

Build

Learning never stops, but the focus of the **Build** phase of onboarding moves to a deeper dive into organizational structure, mission, and business goals. Build activities may include job shadowing or work rotation to give the new hire direct insight into how their current role impacts the business, along with future growth and development opportunities. The Build milestone ends with a 1:1 for manager feedback and a second personal check-in survey.

Do

Kick off the **Do** phase of the onboarding program with a stretch assignment that demonstrates the knowledge, skills, and insight gained up to this point. Tie the assignment to real business needs and career goals of the new hire, and make sure the scope of work is realistic, considering normal daily work activities. As before, end the Do milestone with a 1:1 manager review and personal survey.



Expand or contract the timing of program milestones to meet the requirements of your organization.

4 PILLARS OF ONBOARDING

If your current onboarding process looks more like a one-day orientation, moving to an extended virtual program may feel daunting. In reality, you may already have resources available to start with today. Let's break down each essential component of an onboarding program.

A comprehensive onboarding program will encompass four pillars shown in the following table, with suggested program areas.

 MY COMPANY	 MY CAREER	 MY TEAM	 MY SELF
Benefits & Compliance Systems & Tools Products & Positioning	Role Specific Training Coaching Contributing Value	Team Building Culture	Worker Wellness Personal Feedback Soft Skills

PILLAR 1: MY COMPANY



What are the mission and goals of your organization, and how will your new hire be expected to contribute and add value? Understanding how your company works is essential for any worker to be successful. Spelling out rules and expectations clearly from day one is especially important for remote workers, who don't have the benefit of watching and following coworkers. Likewise, scheduled checkpoints to make sure they can access and use required communication and productivity tools will help speed productivity and head off potential frustration.

Benefits & Compliance

Of course you need to get essential paperwork completed as soon as possible. This includes benefits enrollment, company handbook review, and any other human resources topics that apply. Any items that can not be completed in advance of hire are typically scheduled for day one, or within the first week.

Some items you may even be able to complete via email ahead of time, in between the offer acceptance and your new hire's start date. If something can't be signed digitally, be sure to mail it in advance.

Getting the paperwork out of the way gives your new hires time to focus on making interpersonal connections. With virtual onboarding in particular, it's important to emphasize the human element from the very beginning.

Spread out your compliance training throughout the first month of onboarding. Compliance training is important, but trying to pack it all in the first week will slow down productivity.

Depending on your location, you may be required to provide anti-discrimination and harassment training to every new employee. Additional compliance training topics to consider are cybersecurity training—especially important with remote employees—and unconscious bias or diversity and inclusion training.

Systems & Tools

Technology can connect co-workers around the world, but learning new systems and tools can be overwhelming, especially for a first time remote worker.

To get your new hire working productively, you'll need to ensure they're set up with accounts for all your interoffice

A 2017 Career Builder survey reports that 36 percent of employers lack a structured onboarding process, leading to lower productivity, higher employee turnover, lower morale and lower employee engagement.

communication tools (email, video conferencing, instant messaging, etc.) and that they know how to use them.



The easiest way to do this virtually is through screen recording videos with step-by-step demonstrations of each tool.



For technology to be applied successfully, it has to interface with business structures, culture and people. The best asset for any business to have is people who can quickly and insightfully interpret the data that technology provides, and use it to make smart decisions.

– Daniel Newman for Forbes.com



Then go into more detailed processes like file management, time tracking, and any company-specific systems like product lifecycle software, customer relationship management systems, and your learning management platform. Many softwares feature built-in online knowledge bases and help guides for new users that are perfect for remote workers. Begin this training day one, and continue throughout the first weeks of onboarding.

Products & Positioning

What product or service does your organization offer? Who do they serve? Whether it's education or patio furniture or software, everyone in your organization should know how to talk about and use your products or service, as well as see the value of your mission and goals.

All new hires should be trained on:

- Product features, benefits, pricing, and at least an overview of technical data
- Customer segments
- Competitor information

- Frequently asked questions or concerns customers have about the product and how to respond
- Who the go-to person for each product or service is

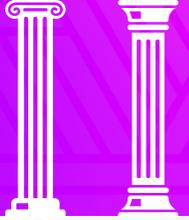
Your Learning Management System (LMS) or Learning Experience Platform (LXP) should make it easy to deliver product training virtually. Along with formal training and product sheets, don't overlook recorded demos, webinars, or presentations.

In addition to product info, share rules for interacting with the public, and how to talk about the company itself.

Does your company encourage employees to share product and company news on social media? Do you have specific language and policies for how to do that? Do you expect employees to participate in online message boards about your product or industry? Provide links to examples of posts by other employees.

This part of onboarding could include formal media training or just a quick overview of company social media accounts to re-share.

PILLAR 2: MY CAREER



Showing your new hires how their position at your company aligns with their personal career goals is key to retaining talent. Motivate your employees by providing growth opportunities through training and development, along with mapping out stepping stones that show how they can grow with your company.

Role Specific Training

Assess the skills and knowledge the new hire must build to be successful in their new role, and provide training to develop any skills they might not have yet.

The right learning management system is essential to help build employee skill sets and personalize their learning paths. Choose a user-friendly [learning management system](#) or learning experience platform that will make it easy for new hires to explore how they can grow and develop within the company.

measures success and how his or her role impacts business success. This might include how the company makes money, important metrics to hit, and how the new hire's role contributes to those metrics.

Because this virtual onboarding is woven into the day-to-day tasks of a new hire, you will have chances to provide regular feedback on how they are doing and guide them if adjustments are needed.

Remember to balance critiques with observations of early wins—you don't want your new employee to feel micromanaged and disengage!

Coaching

Assign a coach or mentor to every new hire. Have the veteran employee ask open-ended questions about the new hire's goals and what they want to get out of the onboarding program and their position.

You may be surprised to learn about the effectiveness of automated chat or video coaching delivered through a modern Learning Experience Platform.

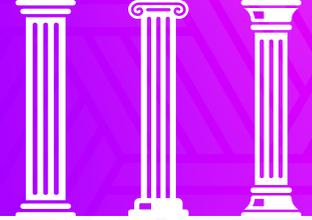
Contributing Value

In order to become a contributing member of the team, your new hire needs to understand how the company as a whole

30x

According to research done by IBM, new hires are 30 times more likely to consider leaving a company if they don't believe they can achieve their goals at that organization.

PILLAR 3: MY TEAM



Feeling confident and fitting in at a new company means building friendships and networking with peers. Find ways for existing team members to welcome and get to know your new hire, whether that's through short video greetings, virtual happy hours, or other activities. These get-togethers encourage networking and help build a team culture.

Team Building

According to the American Psychological Association, communication and shared identity within a team can mediate the effects of physical separation. By delivering a structured, strategic onboarding plan, your new hire will fold into your team and start building a bond right away, no matter where everyone is located.

Schedule time for the new hire to meet one-on-one with their manager, as well as virtual team meet-and-greets and cross-department job shadowing, so the new hire is introduced to the whole company. These scheduled meetings should include a mix of purely social, icebreaker calls and specific project-related meetings.

Here are a few popular icebreaker activities for virtual teams:

Highs and Lows

This quick icebreaker only takes a few minutes. Everyone takes a turn and recaps the best and worst moments of their week.

By sharing their highs and lows, your team shows that everyone goes through the same struggles, and there's always a bright side!

People Trivia

This is a great option to help new hires learn more about their new team. Select a team captain and have everyone send an interesting fact about themselves to the team captain. At the beginning of your meeting, read the facts out loud and challenge everyone to match the fact to the correct employee.

Meme Chat

Everyone loves a good meme! Pick an overarching theme and then message your team a meme related to the theme. The rest of the conversation must continue only through memes! This is especially easy to do in messaging tools like Slack or Skype, which make it easy to share gifs. Set a time limit for the meme chat so you're not spending all day sending silly memes.

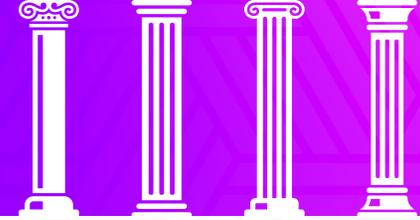
Getting to know each other better creates more open lines of communication and collaboration on projects!

Team building is an ongoing process that will continue long after the formal onboarding is over, but schedule manager check-ins after the new hire has been with the company for a month or two to touch base and see how well the employee is fitting in with the team and the company as a whole.

70%

A LinkedIn survey of over 3,000 U.S. professionals found that 70% said they would leave a leading company if it had a bad culture.

PILLAR 4: MY SELF



Employee wellbeing is critical to career success. What you cover in your onboarding program can have a long-term effect on worker productivity, engagement, and wellness.

Worker Wellness

Give your employees the tools to stay well. This could include training on how to create and maintain a work-life balance, manage stressful situations, or information about regular company-wide fitness challenges.

Employees who work from home are often initially surprised by how little they move during the day. Having each department compete against each other to achieve the most steps as a team over one month is a great way to build camaraderie among remote employees and promote wellness.

Personal Feedback

According to a report by the Society for Human Resource Management (SHRM), successful onboarding improves job satisfaction and reduces stress. Frequent feedback is critical to onboarding program success.

It's said that people stay or leave based on their relationship with their manager. This relationship begins during onboarding. Use

1:1 manager touchpoints to set clear goals, making sure your new hire understands where their role fits in with the team and how they contribute to the organization.

Find out what's working for your new hire through periodic online surveys at each milestone of your onboarding program. You'll help them feel like they have a voice in their new company and open the door to a more collaborative culture—just make sure to follow through on action items!

Soft Skills

Set your employees up for success by including essential soft skills training in your onboarding program. Soft skills like attention to detail, effective communication and critical thinking are some of the most in-demand skills today. For remote teams, good communication skills are critical.

Plus, soft skills apply to every role and cannot be replaced by robots or automation. You can easily incorporate soft skills training into the first month of onboarding by providing microlearning

modules on your learning management platform that your new hires can access at any time.



An investment in knowledge pays the best interest.

– Benjamin Franklin



SUMMARY: SUCCESSFUL VIRTUAL ONBOARDING IS POSSIBLE

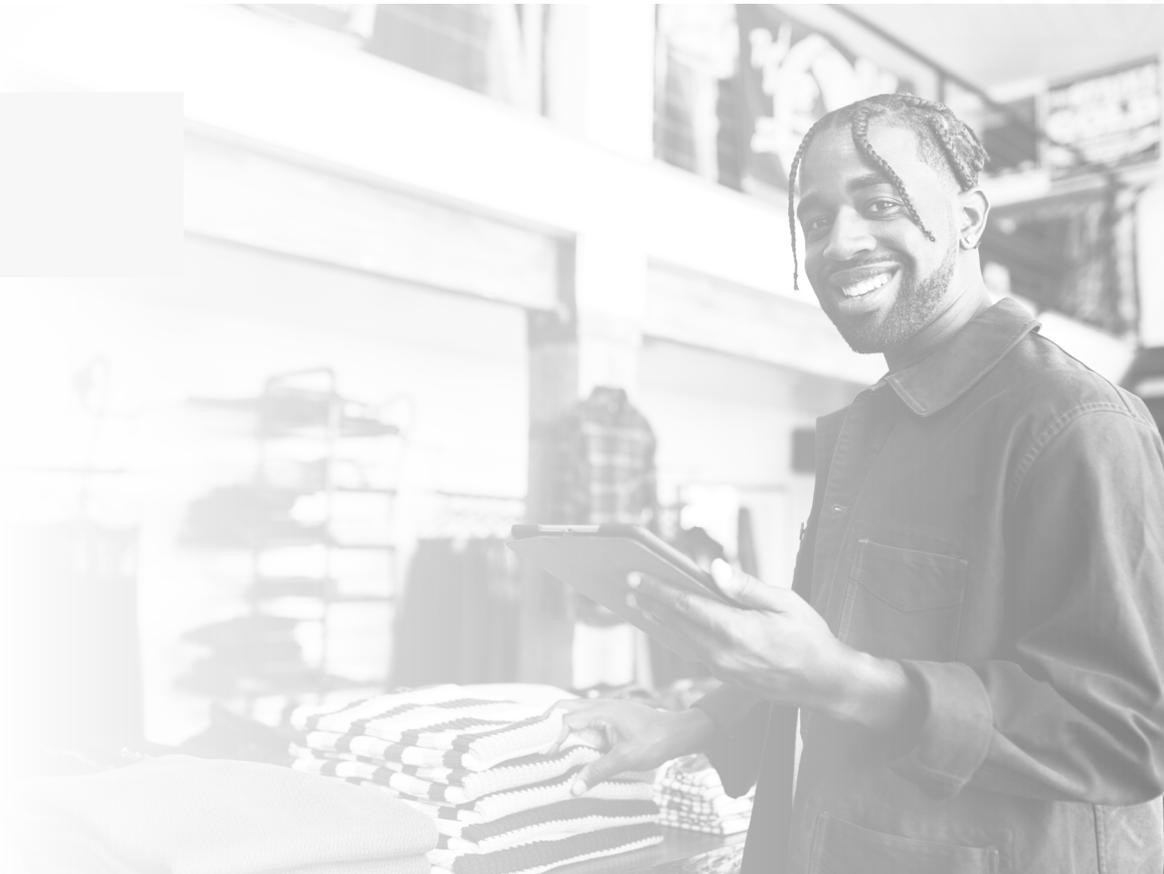
Whether virtual or in-person, the primary goal of employee onboarding is to give your new hires a comprehensive understanding of their role and empower them to perform with confidence.

You may have to trade team lunches for virtual games and video calls, but with an organized virtual onboarding process, you can successfully integrate remote employees into your organization and speed up their path to productivity.

Check out the accompanying printable handouts for more onboarding tips.

Demo Virtual Onboarding Courses

[Contact us](#)



SAMPLE VIRTUAL ONBOARDING PLAN

Create your own virtual onboarding program by following this template.

LEARN

Welcome

Ask a member of your leadership team to record a company vision video to welcome new hires and set expectations for the onboarding experience.

Milestone 1 (1st Week)

My Company

Along with benefits enrollment and compliance training, check communication and workflow technology. Use video or VR to introduce the company HQ, mission, products, and services.

Milestone 2

My Company

How will your new hire be expected to contribute and add value to organizational mission and goals? Understanding how your company works is essential for any worker to be successful.

BUILD

Milestone 3

My Company

Now that your new hire knows more about your organization, invite them to take an active role in monitoring, moderating, and/or participating in your company social media or online community.

DO

Milestone 4

My Company

Excellent written communication is a requirement for business success today. Invite your new hires to participate in a writing exercise appropriate to their role.

Learn/Build/Do milestones align to provide 30/60/90 day feedback. Expand or contract to meet your requirements.

You can experience this plan in action. [Get in touch.](#)

My Career

Some jobs require a lot of setup. Launch a first work assignment with a role or department-specific video or job aid to introduce new hires to references they need to succeed.

My Career

Early on, schedule daily assignment touchpoints to make sure your new hire gets off to a solid start. Decrease meeting frequency as they learn their role and gain confidence.

My Career

Build cross-department virtual meeting attendance into the onboarding experience. A "Virtual Job Shadow" increases understanding of responsibilities and workflow in your organization.

My Career

A DO stretch assignment helps your new hire reflect on learning and demonstrate their value to your organization. Kick off the assignment with SMART goals, expectations, and responsibilities.

My Team

Find ways for existing team members to welcome and get to know your new hire, whether that's through short video greetings, virtual happy hours, or other activities.

My Team

Confidence at a new company grows by building friendships and networking with peers. Virtual team get-togethers encourage networking and help build a team culture.

My Team

Team lunches and after hours meet-ups. Ask your eLearning Brothers Solutions Consultant how you can host an official Jeopardy!® for Training game with your team.

My Team

Encourage all team members, not just new hires, to regularly showcase what they are working on to build team camaraderie and spark new ideas.

My Self

Be sure to solicit feedback early and often. End the first milestone with a personal survey and 1:1 manager checkpoint to make sure the new hire is getting off to a good start.

My Self

Reflect on what the new hire has learned about the company, their role, and their team. Solicit ongoing feedback through a personal survey and 1:1 manager checkpoints.

My Self

The Milestone 3, the manager 1:1 should help the new hire see how the competencies they have built to this point add value to the organization. Check in with a personal survey.

My Self

Your onboarding program can have a long-term effect on worker productivity, engagement, and wellness. Conclude the program with a final survey and 1:1 manager checkpoint.

VIRTUAL ONBOARDING CHECKLIST

Does your onboarding program check all the boxes? A comprehensive onboarding program should hit each of these four pillars.

Pick and choose from the examples provided to create a customized onboarding program that meets your organization's needs. Sample activities and touchpoints are included for each topic.

MY COMPANY

- Virtual Office Tour
- Handbook Review and HR Q&A
- Benefits Enrollment
- Company History & Values
- Technology Access Checkpoint with Tech Support
- Internal Technology and Systems Training
 - Email & Slack Training
 - Time Tracking & File Management Training
 - Cybersecurity Training
- Compliance Training
 - Harassment Training
 - Unconscious Bias Training
- Product Intro: Virtual Expo or Website Scavenger Hunt
- Assignment: Social Media Participation
- Assignment: Community Participation
- Training: How to Write an Irresistible Blog Headline
- Assignment: Author Product Review or Blog Post

MY CAREER

- Daily or Weekly Progress Checkpoints (repeated through duration of program)
- 1:1 Coaching
- Department Rotation
- Business Skills Training
 - Role Specific Training
 - Meeting Management Training
 - Presentation Training
- Research & Prep for Stretch Assignment
- Stretch Assignment

MY TEAM

- Team Meet and Greet
- Teamwork & Collaboration Training
- All Team Social
- 1:1 with Team Members
- Team Trivia
- Show & Tell Presentation to Team

MY SELF

- Assessment and Individual Development Plan
- Welcome Video
- Program Expectations and Accountability Videos
- 1:1 with Manager
- Periodic Survey
- Soft Skills Training
 - Communication
 - Work Life Balance
 - Stress Management