

Virtual Onboarding - 50 point checklist



Most organisations I'm talking to - if they are still recruiting - are still struggling a little with how to virtualise their onboarding.

I've mentioned before that we've got 3 stages to go through with the crisis we are facing right now - SOS, Tactical and Looking Ahead.

The ideas that I've pulled together here have come from roundtables, research and my own experience in designing digital onboarding experiences. You'll be able to work out which ones are relevant for you to make an emergency pivot (SOS stage), to 'cope' (Tactical stage) or to take advantage and create your new normal onboarding (Looking Ahead).

Get your mindset right from the outset

1. Reprioritise the existing experience; don't assume you can just flip it to virtual, it may take a few steps and iterating is just fine. Get the essential basics right for day 1 and build from there.
2. Focus on win/wins for your existing staff too - spread the burden from the manager, make sure it's easier for shared services than ever, and a jolly good onboarding experience too.
3. Get clear on responsibilities from the outset - who's communicating what & who's actioning what are particularly important and it's important to get into the details with this as there are a LOT of grey areas with onboarding.
4. Plan for disruption, not because of it: Make assumptions and use them as design principles: eg you won't go back to face to face, or that you have to have a plan B should the laptop be late. Track those assumptions as planning for disruption is going to become your new super-power.
5. Collaborate carefully: collaborating is harder than usual because we are online, so plan your conversations and approaches more thoughtfully than you might have done in the past.
6. But move quickly: I don't know about you but last week was one hell of a year. This pace is not going to disappear - you need to work out how you can discover a new gear.

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Are you lifting and shifting an existing process?

7. Re-prioritising for expediency is inevitable:
8. Does your current timespan still apply (ie -4 weeks to +9mths) or is it shorter – for now?
9. do you need all the stuff from day 1 or can you compromise?
10. what should be delivered in a later phase & what adjustments need to be made?
11. Who needs to be involved with each phase?
12. Be prepared to learn as you go – polls and surveys should still apply, but maybe in phase 2.
13. Modifying your content for virtual learning can be as simple as copying a binder into a googledoc with headings.
14. Replace face to face greetings with video
15. Replace side by side training with video
16. Many people don't have a printer at home, so if they've historically signed and witnessed HR documents at their local post office, what do they do now? You'll need to relax the 'no partners as witness rule' and you'll need to move to an e-signature tool or accept a photo of the signed page sent by their mobile phone.

Are you redesigning or designing from scratch?

17. Stay focused on experience, efficiency and compliance in equal measure as best you can – it's the win/win/win outcome that all great solutions need to succeed and it will help your collaborations to be more successful across the other areas involved in the delivery of a good onboarding experience.
18. Iterative value – build your solution so that you can roll out something today, add on something else tomorrow and another thing next week. It doesn't have to be perfect from day 1 to deliver value from day 1 – we know we have to move fast, and we can retrofit with recent starters; they will understand.
19. Future-proof: And design for the future – what would be the harm in assuming that you won't go back to F2F onboarding ever again? No harm if you're wrong, lots of benefit if you're right.

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20. Good onboarding is a highly collaborative effort across a minimum of TA, Payroll, L&D, IT, the hiring manager and the candidate. This will mean more engagement across your peers than you might have originally considered, and this will need talking and planning to be effective.

21. Design your journey from a user experience perspective, remembering that feelings right now are more important than 'stuff'.

Feelings = experience

Onboarding is one of the most important and impactful moments that matter in an employee's first year so it's important to get it right and to view it holistically - it is more than just onboarding to payroll or systems, or induction, or orientation. It is all of that and more.

This is how your new starter feels:

They're keen to impress by showing their value and proving to you that you've made a good decision hiring them. This standard emotion will be heightened in an unsecure job market, and words like 'last in first out' will be going through their heads, so they REALLY don't want to ask their boss stupid questions like 'where's the on button?'. Who else can they ask?

They'll be feeling suddenly very lonely and disconnected due to working from home from the outset - which most of us have never done. Even if we've worked from home we usually start with some face to face time.

It's highly likely they'll associate this unsettling experience with you - 'I had a team in my last job and in this one I have no-one' aka, this culture isn't as good. We'll have to overcompensate for that impression in order to engage and retain them in the long run.

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22. If you don't have a buddy yet, get one (or more than one). This will support your new starter and remove pressure from the manager. It also helps that buddy feel useful at a time when they too might be feeling powerless or useless.

Before day 1 –

23. join the team whatsapp or slack channel with their existing mobile number; don't wait for official logins to welcome them aboard.

24. Virtual coffee with the boss

25. Pictures, videos and insights into company culture

26. Team welcome video – this can be as simple as sharing a gallery view of the team on Zoom saying hi....

Day 1

27. Virtual lunch with the team.

28. Individual 1:1s with the team across the week.

29. Virtual tea with a buddy.

30. Make sure human connections are made, mobile numbers are exchanged, and a clear team routine is established from as early as possible.

Week 1

31. Introductions to key stakeholders for this person's role and to any support contacts they might find useful

32. Give them a clear agenda for week 1 so that they can settle into a new routine and really feel familiar with their team – just a Day 1 schedule will not be enough.

33. Assign them 2-3 tasks that they can complete over the first week to help them feel useful – don't make them wait for their manager to be available before they get their next instruction.

34. Develop and share a task calendar across the whole team

35. Define short-term and long-term goals early on (and, of course these may change)

36. Schedule weekly one-on-one meetings

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37. And this is your hiring manager right now:

CV19 has been the great leveller hasn't it? No matter how senior you are, you're freaking out in your own way right now. This means that managers can't be expected to 'just handle it'. They are largely overwhelmed by leading remotely and managing in a crisis at the same time.

Many of them are unclear (or unwilling to admit it) about who is responsible for the admin burden of onboarding.

They are universally keen to get value from their new starter as soon as possible, and are increasingly frustrated by IT, access, compliance and other barriers to success.

They are probably not 100% clear on the WFH policy, haven't had time to read it but don't want to make that their new starter experience either (here, read 90 pages and come back to me).

38. Introduce buddies to alleviate some of the admin pressure on managers right now. It's time to democratise leadership and remove the single point of failure that is, in most teams, the manager. Spread the burden of onboarding between team members and split this up across social & wellbeing, technical & compliance needs, and general orientation and introductions.

39. Don't overwhelm your managers with processes and tasks; instead prompt or nudge them to take one step at the appropriate time. If you've got an onboarding system, great. If you don't then try these:

40. Schedule in a diary task for managers with the link to the appropriate resource on the day that it's required.

41. Use Asana, Trello or MS Flow to schedule tasks based on start date so that everyone get just in time instructions

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Leadership Language:

42. Simplify: When it's scared, the human brain will shut down the smart stuff in favour of the survival stuff – we literally dumb down to flight, fight or freeze mode. So give them short bite size chunks at the right time - people can't handle complexity or memorise instructions right now (and this is a great tip for the future – they were struggling to do this when we were merely in the new world of work – well before CV19.)

43. Move from benefits to why: Most instructional communications start with what you need to do, followed by why you need to do it; you know 'take these steps because it's important to...'. This is known as selling on benefits, and most people have wised up to it and find it quite demotivating. When you're writing your comms, try one simple trick – reverse your sentence. 'Because its important to... take these steps'. This is called leading with the WHY and it makes a huge difference in comprehension, motivation and adoption.

Provisioning:

44. Delivery: Equipment is a physical thing, and therefore a contactless exchange can be really challenging. Apart from handing over a laptop by dangling it off a fishing rod, here are some tips about getting equipment to new starters at home:

45. Did you know that Amazon prime customers get significantly expedited delivery?

46. Couriers are still doing a great job

47. Fulfilio may be able to manage the stock holding and distribution of laptops you've ordered so no-one in the office has to handle them between A and B.

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How to's:

48. Don't forget to provide set-up instructions and contacts via personal mobile or email as they'll be setting up from scratch without your onsite support – being cautious about how you share passwords and login credentials safely.

Welcome swag:

49. I'm not talking about a stress ball, but perhaps something at the end of week 1 that is actually about them; based on what you've learned that they may need – a plant, a lasagne recipe, how to cut your own hair.

Thoughtfulness and personalisation will trump process and technology every time.

50. If you need to fast-track your approach to Onboarding, Redeployment & Redundancies, Repurposing TA or managing your Resilience, then you need to do one of these things:

- Email me for the other one-pagers that you need from the above list
- Book a one-off mentoring call with your HR / project team to accelerate and enhance your implementation plans
- Schedule a confidential, one-off mentoring call with you one-on-one.
- Join the Level-Up group mentoring program for Talent Leaders



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About the Author



Rebecca set up BoldHR to help HR Leaders start doing business differently.

According to Justin Trudeau in that year, "The pace of change has never been this fast, and it will never be this slow again", but alongside the increased pace of change is an increasing failure to change - in fact McKinsey estimates up to 70% of transformations fail.

And right now, we have no choice but to change, and the smart ones among us are asking - when's the next major disruption going to be and are we ready - are we change-ABLE?

Rebecca helps you to get ready - to do business differently with confidence, through focusing on Leadership and Talent.

Her ability to synthesise complexity, challenge traditional approaches, engage teams and create alignment is well-regarded and she works with a range of clients across public & private sector who are undergoing change.

This unique combination means Rebecca has both the experience and deep expertise to advise, coach and train business leaders facing into volatile, unpredictable, complex and ambiguous circumstances.

Rebecca's career has spanned two international decades at the pinnacle of Talent thinking.

Rebecca's passion is imparting confidence and impact - many of her clients return to Rebecca even after their goals have been achieved for her pragmatic and hands-on support and her ability to navigate the many and varied challenges facing today's leaders.

She is a highly sought after coach, trainer and facilitator for established businesses in disrupted industries - and works regularly with clients in public sector, education, health and financial services.

She also devotes time to elevating the strategic capability of the Talent Industry, working closely with HR and Talent Leaders, their suppliers and partners.