

## Your Guide to Virtual Onboarding

Even in less disrupted times, we all recognised the vital role of onboarding in the long-term engagement, retention and productivity of valued employees and were at various stages of development in our onboarding processes.

With most of us remote working and relying on virtual communication, the ability to nurture commitment, connection and cultural integration can be more challenging and will most likely require a look at how the onboarding process is delivered.

For many of our clients and candidates, hiring and onboarding virtually is a relatively new experience, as is working and managing remotely – some as a short-term and temporary necessity and for others, a catalyst to adapt business models and operations for long-term growth and profitability.

We also work with many clients who have been successfully operating remotely for years and reaping the benefits of flexible capacity, reduced stress of commuting for employees, cost savings and increased productivity.

The aim of this guide is to share our insights and to help you create a seamless, effective and enjoyable virtual onboarding process.

### The scope of onboarding:

It is important to highlight that prior to onboarding, how well the recruitment process is managed and delivered is crucial for creating lasting first impressions, expectations and relationships.

Our job is to support our clients with clear role definition, authentic representation, good communication and decisiveness, which are all critical factors in forming positive relationships during this stage. We're also helping our clients to utilise virtual communications and online tools to run interviews and successful selection processes, without the luxury of face to face meetings.

- **Acceptance of offer**  
*This stage covers the immediate period following an offer of employment.*
- **Preparation**  
*Ensure a seamless first week for both employer and employee by arranging the right tools and conversations so that your new starter can get up and running from day 1.*
- **Day one**  
*Setting the scene from day one and during the first week.*

- The first 30 days  
*Looking beyond initial orientation to the process of fully onboarding and immersing your new starter with other areas of the organization.*
  
- Ongoing  
*Ensuring you continually evolve and improve your onboarding process by learning from the feedback and experiences of employees.*

If you have several new starters at once, try to achieve a common start date. Even if they are in different departments, many of the core onboarding requirements and training can be delivered together and provides a great way for your new employees to get to know others in the business and share their learnings.

*69 percent of employees are more likely to stay with a company for three years if they experienced great onboarding (SHRM, 2017).*

## **Onboarding Checklist**

### **Acceptance of Offer:**

- Verbal offer
- Formal written offering
- Written acceptance of offer
- Agree start date
- Issue job contract, copies for employer and employee
- Signed contract received
- References
- Other onboarding compliance: e.g. Credit Check, Criminal Record Checks, qualifications, certificates
- Send copy of full job description and role responsibilities
- Request for new starter information:
  - Contact information
  - Social security
  - Payroll/bank details
  - Next of Kin
- Tax and Eligibility to Work forms
- Pension

- Death in Service
- Business/role specific agreements: [examples]
  - Confidentiality Agreement
  - Non-disclosure Agreement

### **Preparation:**

- Order employee equipment for delivery at time to suit employee:
  - Laptop / PC
  - Mobile phone / phone and/or headset
  - Tablet / mobile device
  - Printer
  - Screen
- Set up employee accounts for IT systems and applications:
  - Company email
  - CRM
  - Cloud storage account
  - Office 365
  - Video conferencing/Microsoft Teams/Google Hangouts/ Zoom access
  - Intranet
  - HR system / Leave Management system
  - Payroll system
  - Role-specific applications: consult with manager / supervisor
  - Set up cyber security requirements such as multi-factor authentication
- Address individual requirements of remote employee:
  - WiFi / connectivity requirements
  - Workspace / workstation needs (shared office space? Equipment needs)
  - Applications / tools for managing workload, accountability, time management
- Book and add induction sessions and training to employee calendars

- Ensure they are invited to long-standing company or department events – e.g. Christmas party, summer away day, quarterly presentations or team celebrations.
- Book probation review meetings and anticipated end date (typically 3 months after start date)
- Identify the best people to onboard your new starters in each department. This isn't necessarily the most senior person in each department. Rather it should be an enthusiastic, knowledgeable and committed individual who will present the company in the right light – and has time to dedicate to it. Ideally, it should be part of THEIR job description to ensure good onboarding, not an unwanted task passed to the person who doesn't object quick enough.
- Book induction sessions with key departments:
  - Management: company overview
  - HR, including health and safety training
  - Finance
  - IT, including Cyber Security training
  - Sales
  - Marketing
  - Investment/Asset Management/Development/Design etc.
- Send Welcome Email to new employee including:
  - Onboarding itinerary
  - Key contact details
  - Employee handbook / login details and access to preboarding intranet area
  - FAQs document
- Send 'Welcome to the team' goodie bag
- Send 'Your first day' email a day or two before, including:
  - Instructions for setting up laptop/PC
  - Requested hours of work and itinerary
  - Login details for email/initial key systems – but ensure passwords are sent separately, or provided verbally

## Day One:

- Initial welcome and virtual office tour
- Set up of essential systems, accounts and communication tools with IT
- Introduce to the team, including any direct reports
- Provide and talk through company organization chart - how about using a corporate video introduction with a message from the CEO or other senior team member? Combining live introductions with video is an important balance.
- Company overview including history, values, mission, leadership
- Introduce to dedicated sponsor, mentor or buddy/peer
- One-to-one meeting with manager or supervisor
- Introduction to intranet including essential company/HR resources and information
- Policies such as social media policy and understanding compliance requirements such as data protection and working against Modern Slavery practices.
- Cyber security training – your new employee is the weakest link in your IT security as they are not familiar with authorisation protocols. Provide examples of Phishing attempts on your business previously so they can see what NOT to action. This is particularly important for anyone with “finance” in their job title. For example, we find that our recruitment team who focus on finance and accountants get far more phishing attempts for them to authorise payments than other colleagues as the scammers believe they are in our internal finance department. Your external IT provider may have some training on offer as part of their service, or you can find good free resources online such as [here](#).

## The First 30 Days:

- Induction sessions with key departments:
  - Management: company overview
  - HR
  - Finance
  - IT
  - Product / services representative
  - Sales
  - Marketing
  - Investment/Asset Management/Development/Design etc
- Set out success metrics, deliverables and key projects for first 3-6 months. At Cobalt we encourage employers and employees to think about what they can achieve in the first 100 days and have a follow up meeting with both to explore these achievements”
- Training on core business processes: e.g., booking leave, submitting expenses, raising POs
- Check and cater for any training requirements
- Book check-in meetings with line manager /supervisor
- Book in HR check-in meeting to follow up on induction period
- Send onboarding evaluation
- Check first “pay check” is received correctly (nothing worse than a new starter with no pay....!)
- New starter lunch – depending on the volume of new starters, an opportunity to gather informally with others who have recently joined along with some longer standing colleagues can prove invaluable. In the times of social distancing there is no reason why this couldn't be virtual!

### **Ongoing:**

- HR induction review meeting conducted
- Onboarding evaluation received and any points raised addressed
- Probation review meeting conducted
- Contract, benefits and permissions adjusted on completion of probation period
- Annual appraisal/review meetings diarised
- Personal Development Plans agreed

### **Welcome to the world of Cobalt.**

In an overcrowded market, we are authentically different. We believe that relationships are based on chemistry and trust. To us, the real value of recruitment lies in the ability to attract and retain these relationships, just like the magnetic metal we're named after.

### **Ready to take your team, project or business to the next level?**

You're in the right hands. We'll help you focus your time and energy where you'll get the best results. After all, we're here to get you to your goals faster.

We're proud to work with ambitious, passionate and dedicated professionals and businesses in the world of international real estate and construction, so as specialists you can rely on a quicker and easier recruitment experience.

Whether you're on the hunt for someone to fill a permanent or interim position, we've got it covered.

We're always here if you need help defining a role or brief, specialist insight to help shape your ideas or expert help with your virtual recruitment process. Just email [info@cobaltrecruitment.com](mailto:info@cobaltrecruitment.com) to arrange a conversation with one of the team or if you're ready for us to find the perfect person for you.

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