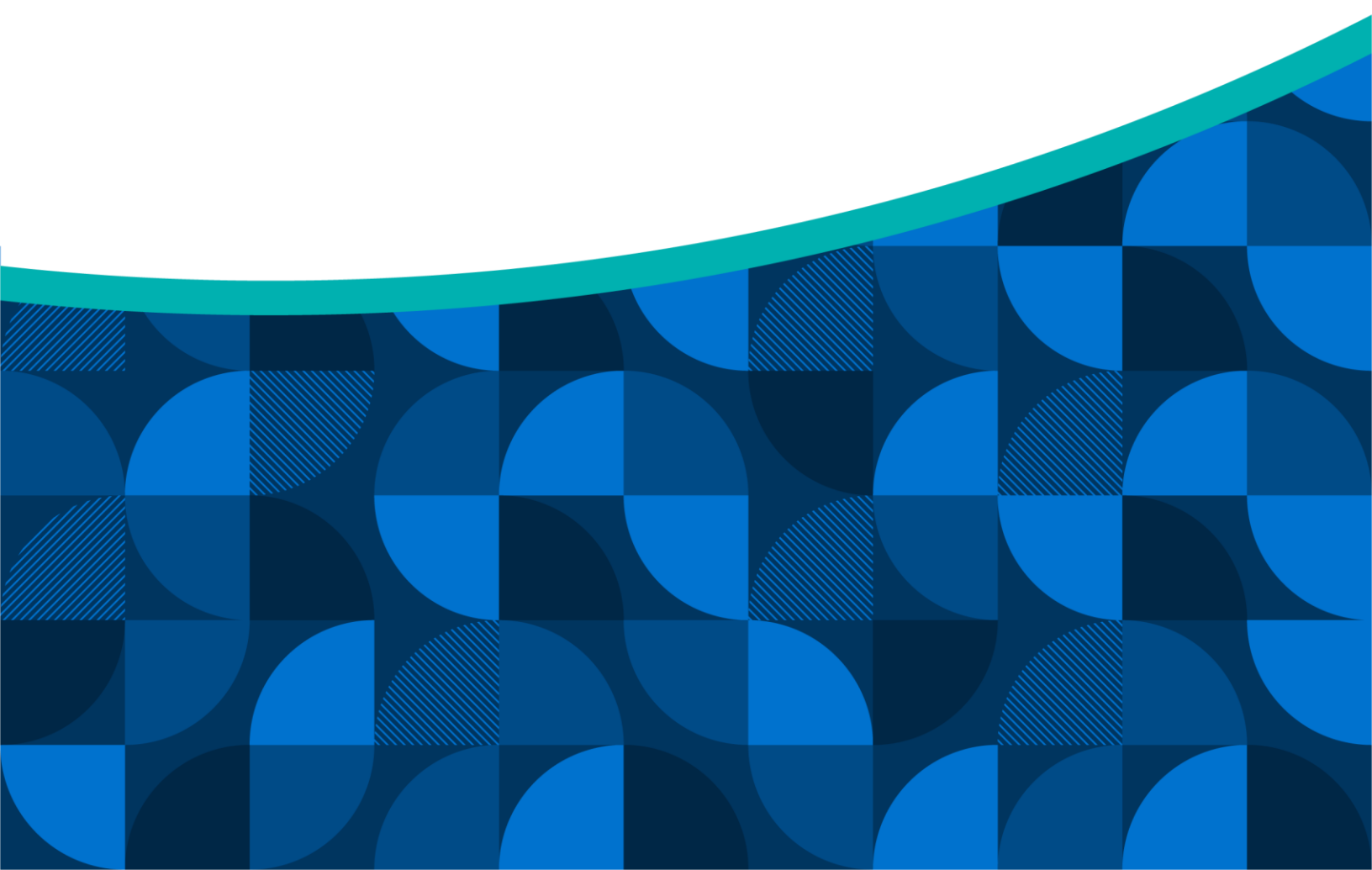




Manager's Guide to Remote Onboarding

Tools to Orient, Educate, and Network
Remote Employees



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Executive Summary

Remote Employees Require Early and Unique Supports

There are many benefits to hiring remote employees. On average, remote employees have fewer workplace interruptions, are generally happier and healthier, and are significantly more productive.

Compared to other employees, remote workers are **60-80%** more likely to **strongly agree that they make progress in their workday.**

However, remote employees face unique challenges as well. In addition to an average of 10% more time logged in each week, remote employees struggle with:



A lack of access to information, with additional time and effort required to find answers from coworkers



Social isolation if there are not opportunities to connect with coworkers in a remote setting



Communication issues without in-person cues or background context



Difficulty prioritizing and managing work with less manager interaction

These challenges can compound and affect employees most at the beginning of their tenure; one study of remote workers at 60 companies found that **more than half of remote employee turnover occurs within the first 100-120 days of employment.**

Executive Summary (Cont.)

Standards for Onboarding Remote Employees

The good news is that managers can get ahead of some of these challenges with a thoughtful onboarding process. Use the principles below to guide the onboarding of remote new hires.

Standards	Rationale	Examples for Managers
Meet early and often.	For new hires to have sufficient access to information and an understanding of how to prioritize their work, managers need to invest in frequent communication during the onboarding process.	<ul style="list-style-type: none">• Hold daily check-in meetings for first two weeks• Keep in touch with new hire via instant messaging
Provide a peer mentor.	A peer mentor can answer common new hire questions and create a social connection for the new hire within the institution.	<ul style="list-style-type: none">• Set up a peer mentor who can answer common questions• Ensure new hire knows who they can connect with to get answers to specific questions
Build a sense of team.	Team cohesion engages new and current employees and improves morale.	<ul style="list-style-type: none">• Hold a team meeting with ice breakers• Schedule team pull-ups to discuss priorities
Set clear expectations.	Since remote staff often miss context and background information that on-site staff benefit from, it's important to share clear performance expectations and work plans.	<ul style="list-style-type: none">• Create an onboarding plan for the first few weeks• Discuss communication expectations (frequency and channel)
Share remote work resources.	To promote long-term success, supply remote new hires with institutional resources, necessary technology, and tools to support mental and physical health while working remotely.	<ul style="list-style-type: none">• Identify institutional resources for remote workers• Confirm that new hire has necessary technology and access to department files

Executive Summary (Cont.)

Six Critical Tools Managers Can Use to Improve Remote New Hire Onboarding

This guide equips managers with the six tools efficiently and effectively onboard remote new hires. Collectively, these will help managers ensure new hires feel welcomed on their first day, supported in their first week, and receive meaningful feedback about their performance across their first four months.

Many of the underlying concepts could be deployed for on-site new hires as well as remote ones. Practices particularly relevant for remote new hires are **bolded in blue** for easy reference.

Tool	Intended Use	Page
Tool #1: Manager Preparation Checklist for New Hire	List of activities to prepare manager to welcome new hire	7
Tool #2: Welcome Note Template	Sample language manager can use to reach out to new hire before start date	8
Tool #3: New Hire Welcome Folder Checklist	Inventory of materials for new hire to be included in a digital folder	9
Tool #4: New Hire First Week Activities Checklist	List of potential activities for new hire's first week	10
Tool #5: Manager-New Hire Discussion Guide for First Check-In	Detailed questions to encourage meaningful discussion during manager-new hire check-in meetings at the end of first week of employment	11
Tool #6: Manager-New Hire Discussion Guide for 30/60/90/120-Day Check-Ins	Thoughtful questions to enable managers to assess new hire's acclimation to the role and institution	12

Tool #1: Manager Preparation Checklist for New Hire

Goal

This checklist contains the steps managers should take before each new hire's first day. Managers should review the list at least two weeks before the new hire's start date to allow sufficient time to complete all the tasks.

Coordinate with IT to mail a laptop or other equipment as soon as possible to ensure equipment arrives before the start date.

Estimated Time Required

1 hour total (spread over multiple activities)

Related Tools

Tool #2: Welcome Note Template (page 8) and Tool #3: New Hire Welcome Folder Checklist (page 9)

- Confirm new hire's start date with HR
- Alert IT Department/Operations of new hire's start date to arrange the following (if applicable):
 - Computer access: laptop pick-up or delivery (coordinate with IT as soon as possible if laptop is being mailed to remote worker)**
 - New hire institution ID/badge (if worker will occasionally visit campus)
 - Email account
 - Voicemail account
 - Assigned cube/office space (if worker will have one for occasional campus visits)
- Create virtual onboarding schedule** for first three weeks. Begin with the HR orientation schedule and proactively invite new hire to any additional meetings. Examples include:
 - Manager virtual lunch
 - Peer virtual lunch (a lunch with other employee(s) at the same level)
 - Check-ins with team members and people critical to their role
 - Online tutorials they should watch
 - Manager daily check-in. Frequent check-ins, especially in the first few weeks, ensure a remote new hire has the opportunity to ask questions and a manager can give needed guidance.**
- Email welcome note to new hire one to two weeks before start date (see Tool #2: Welcome Note Template)
- Assign staff mentor or peer "mentor"
- Add new hire to department organizational chart, telephone/email directory, and distribution lists
- Announce new hire's position and scheduled start date to department staff, either at staff meeting or via email
- Set up cell phone (if applicable)
- Set up travel account (if applicable)
- Prepare department welcome folder for first day (see Tool #3: New Hire Welcome Folder Checklist)
- Prepare folder of documents that may be needed for reference and ensure they are up to date e.g., employee handbook, document templates, etc.
- Arrange for first day welcome gestures (e.g., schedule a virtual team meeting or virtual lunch)**
- Create a checklist with initial tasks for the new hire (e.g., reviewing key webpage(s) or documents, systems set-up)**

Tool #2: Welcome Note Template

Goal

This tool includes a checklist of elements to include in a welcome note email, as well as a sample email. Managers should adopt this for their own use and email a welcome note to each new hire one to two weeks before their start date.

Estimated Time Required

15 minutes.

Additional Resources

New hire's email address.

Checklist for New Hire Welcome Note

- Congratulate new hire and welcome them to the team
- Introduce yourself and explain that you will be their direct manager
- Ensure new hire understands instructions for the first day
- Provide an overview of the first week on the job (schedule, tasks, etc.)
- Link to or attach any pre-reading that would be helpful or get them excited
- Provide a contact for additional questions/issues that arise before start date

Sample Email

Dear Alison,

Hope you are doing well and are looking forward to your first day at [INSTITUTION] on [DATE]. We are thrilled to have you on our team. I'm especially looking forward to being your direct manager and working closely with you. I have been at [INSTITUTION] since [DATE] and [INSERT PERSONAL REFLECTION ON TIME IN ROLE AT INSTITUTION].

I'd like to give you a preview of what to expect during your first week.

- On your first day, plan to...
- During your first week, you will...

I'm also attaching [EXAMPLES OF RECENT PROJECTS, PRESENTATIONS, ETC.] for you to get a sense of some of the things we work on. Feel free to review now or during your first week!

Do not hesitate to reach out to me or your HR representative if you have any issues getting your laptop and equipment or have any questions before your first day.

We are glad to have you on board!

Best,

Leigh Ann Gardner

Tool #3: New Hire Welcome Folder Checklist

Goal

This checklist contains items managers should include in a digital folder that new hires receive access to on their first day. If you are assigning each new hire a peer mentor, consider asking the mentor to create the welcome folder and review it with the new hire.

Estimated Time Required

1 hour to collect materials for the initial folder, 10 minutes for each subsequent folder.

- Job description
- Department mission and goals
- Department organizational chart and leadership bios
- List of current department projects and related materials and/or link to relevant folders
- Department staff work schedule (**including time zones**) and scheduling procedures
- Copy of employee handbook
- Resource page with links to info for new employees, as well as context and resources important for remote employees to have.**
Example links:
 - Benefits page
 - Campus calendar
 - Virtual tour
 - Institution's news and social media platforms
 - Training portal and/or links to online courses available to faculty and staff
 - IT homepage
 - Employee mental health resources
- Copy of or link to explanation of benefits and PTO policies
- Security and building access procedures with link to campus map (if employee will visit campus)
- Department phone, email, and directory (including new hire's contact information)
- Phone and email directory of primary contacts in other departments
- List of whom to contact for help with specific challenges e.g., if a new hire is needs access to the enrollment management system, contact Enrollment Management Director Jill Smith

Tool #4: New Hire First Week Activities Checklist

Goal

This checklist contains must-do steps to ensure new hires learn crucial information in their first week.

Estimated Time Required

1 hour of direct manager time for each new hire

Related Tools

Tool #5: Manager-New Hire Discussion Guide for First Check-In (page 11).

- Complete manager-new hire meet-and-greet
 - Review job description and expectations
 - Review work schedule (**especially if new hire will have flexible hours or is in a different time zone**), time off and holidays, pay schedule and overtime policies (if applicable)
 - Share communication preferences regarding channels and frequency, including any communication technology used by the team (e.g., Slack, Microsoft Teams)**
 - Ensure new hire has time scheduled with IT/Operations (if not done by HR) to set up the following:
 - Email
 - Voicemail
 - Network access
 - Relevant passwords
 - ID badge and keys (if employee will visit campus)
 - Ensure new hire has all technical equipment necessary for them to be successful; fully remote workers are 27% more likely than nonremote employees to strongly agree that they have the materials and equipment to do their work right.**
 - Discuss performance management process (e.g., goals and performance scale)
- Follow initial meet-and-greet with daily check-ins during new hire's first week.** Frequent check-ins, especially in the first few weeks, ensure a remote new hire has the opportunity to ask questions and a manager can give needed guidance.
- Introduce new hire to colleagues via a team video conference and/or individual video meetings**
- Direct new hire to required or relevant HR Orientation sessions, **materials, or recordings**
- Encourage or arrange social opportunities for new hire (e.g., team or peer virtual lunch)**
- Introduce new hire to peer mentor as a resource to navigate the department and institution**
- Complete first manager-new hire check-in at the end of the week (see Tool #5: Manager-New Hire Discussion Guide for First Check-In)

Source: Community Memorial Hospital, Menomonee Falls, WI; Northwestern University, Evanston, IL; Overlake Hospital Medical Center, Bellevue, WA; Renown Rehabilitation Hospital, Reno, NV; Vanderbilt Medical Center, Nashville, TN; "[State of the American Workplace](#)," Gallup; EAB interviews and analysis.

Tool #5: Manager-New Hire Discussion Guide for First Check-In

Goal

This discussion guide equips managers to jump-start more meaningful conversations with new hires. Managers should hold the check-in conversation at the end of the new hire's first week.

Estimated Time Required

30 minutes.

1. Which team members have you met this week?
 - a. Have you spoken to [teammates] and [peer mentor]?
2. Have our team members done any specific actions to make you feel welcome that we should be sure to replicate for other new hires?
3. If you had questions, was someone always available to answer them?
 - a. Who has helped you the most?
4. What was the best part of your first week? What activity did you find most interesting?
 - a. Why did you enjoy that experience?
5. What was the most challenging thing you had to deal with this week?
 - a. How could we have made that challenge easier to manage?
6. Is there anything that you think we should change to help new staff during their first week on the job?
 - a. Can you tell me more about why we should make that change?
7. Is there anything we haven't explained fully?
- 8. Have you been able to access everything you've needed to? Are there any technology issues I can help with?**
9. What are you most looking forward to in your next week?
10. After this week, do you have any concerns or hesitations about the role or team that we can proactively address?
11. Are there places where you think you might want or need more support or resources as you begin your first tasks?

Tool #6: Manager-New Hire Discussion for 30/60/90/120-Day Check-Ins

Goal

This discussion guide equips managers to gauge how a new hire is adjusting and surface any potential retention concerns. Managers should meet with each new hire after the first 30, 60, and 90 days of employment and ask these questions. If the new hire's responses signal that they may be a retention risk, managers should consider meeting with the new hire more frequently to monitor their progress and intent to stay.

Since over half of remote employee turnover occurs 100-120 days into their tenure, managers should address concerns early and conduct an additional check-in at the 120-day mark. This ensures that managers maintain frequent communication with remote new hires.

Estimated Time Required

30 minutes.

Discussion Questions

Signals of Possible Retention Risk

Baseline Expectations

- | | |
|--|--|
| <ol style="list-style-type: none"> Has this job met your expectations? In what ways? Where has it fallen short? Do you have the tools and equipment you need to do your job? | <ul style="list-style-type: none"> Answer to primary question is no or ambivalent Expectations about work conditions unrealistic |
|--|--|

Orientation to Department

- | | |
|--|---|
| <ol style="list-style-type: none"> Which coworkers have been especially helpful to you? From what sources have you obtained information about news in the department and the institution? Tell me about some of your successes during your first [30/60/90/120 days]. | <ul style="list-style-type: none"> Unable to provide examples of helpful colleagues or personal successes Information sources listed are unreliable |
|--|---|

Challenges

- | | |
|---|---|
| <ol style="list-style-type: none"> Describe any frustrations you've experienced so far. Have you done anything to address these frustrations? | <ul style="list-style-type: none"> High number of frustrations Has not tried to resolve problems Blames others for problems Is bothered by typical conditions of department |
|---|---|

Suggested Onboarding Improvements

- | | |
|---|---|
| <ol style="list-style-type: none"> In what areas would more training be helpful for you and other new hires? If you could change one aspect of your experience in the department, what would it be? On which aspects of your job performance would you like more feedback? | <ul style="list-style-type: none"> Uninterested in personal feedback/development No desire to help department improve |
|---|---|

Overall Concerns

- | | |
|---|--|
| <ol style="list-style-type: none"> Do you have any concerns about your job that I could address? | <ul style="list-style-type: none"> High number of concerns Does not share any concerns but appears dissatisfied or anxious |
|---|--|

Source: "[2 Important Statistics](#)," Outmatch; EAB interviews and analysis.



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