

Remote Onboarding Checklist

1. Create a digital onboarding plan

Start by focusing on a 30/60/90 days plan based on the expectations of the role. Make sure to review and update current onboarding processes that are already in place.

Make sure employees fill out all the essential paperwork by the first day

- Tax forms
- Legal forms
- Banking form for payroll
- Retirement plan enrollment forms (if relevant)
- Health plan enrollment forms (if relevant)

Preparing employees for their first day

- Send a welcome gift including swag with your company's brand and color, and include a nice note.
- Send them an email with the status of their equipment and details for their first day.
- Ship equipment with instructions.
- Schedule IT support to help them set up equipment.
- Confirm delivery and setup.
- Have employees test all the equipment and tools.
- Share inspiring quotes from colleagues about working at your company.
- Create their email address.
- Prepare to share essential logins and accesses.
- Create an itinerary or calendar for the first few weeks.
- Outline assignments and goals for the first few months.
- Provide a list of company resources, software, and applications with how-to instructions and credentials when necessary.

2. Welcoming on the first day

You want to make sure new employees feel welcome and part of the team from the start. One of the biggest challenges for new employees during remote onboarding is understanding the company's culture.

- Deliver their email address, email signature, and a list with the access details for your company's email service.
- Schedule a welcome meeting with their team with ice breakers activities.
- Pair them with a mentor to help with the first few months.

- Provide videos, links, and any documentation that details your company's mission, vision, core values, and more.
- Managers should schedule morning and end-of-day meetings.
- Remind managers to be more available than usual.
- Schedule random weekly 20-min virtual coffee (meet-and-greet) meetings with a different team member for the first few months.
- Discuss goals and deliverables and invite them to set their own goals.

3. The first month of onboarding remote employees

Building relationships and taking part in important projects and decisions during the first month will set new employees for success.

- Continue regular manager check-in meetings.
- Schedule random weekly 20-min virtual coffee meetings with people across the company.
- Plan on team-building virtual ice-breakers activities such as virtual trivia, virtual escape rooms, GIF wars, etc.
- Make sure the new employees' tasks require collaboration across multiple teams.
- Ask managers to bring new employees into crisis/urgent projects and other problem-solving events.
- Give kudos and offer recognition when they accomplish their goals.

4. Celebrate the onboarding graduation

Once the new employee is fully onboarded, find a way to celebrate it.

- Decide what the end of onboarding looks like at your company.
- Create a plan to celebrate it according to your company's culture such as through a virtual happy hour, sending a care package of swags or snacks, or having a virtual graduation party.
- Schedule a meeting to reflect on onboarding and discuss new goals and KPIs.
- Ask for feedback about the onboarding process.