The Ultimate

REMOTE EMPLOYEE ONBOARDING CHECKLIST

for HR Professionals in the Public Sector

Remote work has become the de facto method in which many of us conduct our day-to-day tasks, which has inevitably led to challenges for agencies that were less-than-prepared to have their workforces clock in from home. **In fact, only 51% of hiring managers agree their organization's onboarding program is efficient, and only 53% think it is sufficient for preparing new hires (source: Gartner).**

First day or week tasks that have always been done in person, such as introductions to the team, training and orientation, and administrative paperwork, now need to be accomplished in virtual environments.

The process of onboarding remotely requires additional foresight and planning to ensure that employees feel connected to their manager, peers, and the greater organization. A haphazard approach can lead to frustration early on and hinder productivity even in the best of employees.

Whether members of your public sector agency are permanently remote or you're preparing for the next unknown that may require working from home, we've crafted the ultimate remote onboarding checklist for HR leaders and direct managers alike to:

- **Help welcome new employees to your agency**
- **Define concrete job functions and expectations**
- **Form bonds with their colleagues, via webcam and beyond**

PRE-START DATE

- Email a welcome letter with pertinent information including their start date and time, their work schedule, and any details regarding equipment you'll be shipping to them or they'll need to pick up
- Send a meeting invite with a link to the platform they'll log into on the first day with information about what to expect.
- Leverage an online portal as the central hub where all necessary documents and forms are located.
- Enable employees to complete as much administrative paperwork as possible before day one via the online portal.
- Ensure all hardware is shipped or ready for pick up by the employee well in advance of day one:
  - Computer
  - Headset
  - Other hardware
- Request that IT and other stakeholders ensure that all necessary accounts are set up:
  - Email
  - Video conferencing
  - Phone
  - Apps, database, and network access
  - Any software necessary to do their job
- Share an organizational chart that will help the employee understand where they contribute in the organization in the absence of meeting leadership face-to-face.
- Select a peer mentor that will work closely with the employee in their first few weeks to get them acclimated.

74% of new hires consider their peers to be the most helpful source of support during onboarding, according to Gartner.

DAY 1

- Schedule a dedicated time for virtual identification verification and completion of tax forms.
- Share welcome videos that highlight your agency as well as the agency's leadership and goals.
- Schedule a video conference meeting with the employee's entire team to get to know everyone's names, faces, and what they do for the agency.
- Establish a consistent work schedule that you expect the employee to be available.
- Establish the various forms of communication (email, chat, video conference, text, etc.) and the level of urgency/response time expectation for each.
- Provide important dates for reviews, holidays, conferences, annual functions, etc. directly onto the employee's calendar.
- Provide instructions for how to set up the employee's email signature and settings, particularly if your agency has a standard for all employees.
- Let the employee know if any of the people they'll be working with are in different time zones as them.
- Make sure the employee has a full first week booked onto their calendar, whether it be to meet other people, complete learning courses, etc.

WEEK 1

- Have the employee and peer mentor set up time each day to go over standard operating procedures, walk through apps and programs, and participate in Q&A.
- Have everyone on the team schedule a 1:1 video chat during the first week to chat about work and personal interests.
- Schedule an all-team, non-work activity, such as a remote team lunch or virtual happy hour for the new employee to socialize with the group.
- Establish tasks or assignments that should be completed within the first 30 days to set expectations of productivity early.
- Identify the best time to schedule recurring check-ins.
- Get feedback from the new employee on the first week's onboarding process – what was good, and what could be improved.

Managers who effectively connected their new hires with stakeholders and peers that impact their work and can provide coaching improved employee performance by 26%.
SOURCE: GARTNER

30 DAYS

- Compare notes with the peer mentor to see where the new employee stands in adjusting to the team and identify any successes or roadblocks thus far.
- The manager should schedule a longer 1:1 to go over what has been accomplished in the first month and discuss successes and roadblocks.
- Review the 30 day goals and set goals for day 60.
- Leverage an online learning management system to assign the employee courses and quizzes to develop their skills.

60 DAYS

- The manager should schedule a longer 1:1 to go over what has been accomplished in the first month and discuss successes and roadblocks.
- Review the 60 day goals and set goals for day 90.
- Leverage an online learning management system to assign the employee courses and quizzes to develop their skills.

90 DAYS

- Review the 90 day goals and set goals for the remainder of the employee's year, or until their next performance review.
- Consider a centralized 360 performance review via your HCM tool, whether part of your regularly scheduled review cycle or specific by employee, to assess how the employee has done in their first 3 months.