



Virtual Onboarding Best Practices

THE TIMELINE

OFFER

DAY BEFORE

FIRST WEEK

BEYOND ...

MONTH PRIOR

START DATE

FIRST MONTH

As the world transitions to an increasingly digital environment with more remote workplaces, organizations are faced with the truth that virtual onboarding might be the new normal for some team members. While virtual onboarding can be tricky, it's not impossible.

Following this timeline and set of best practices will help ensure a successful virtual onboarding process and improve employee retention.



Offer & Acceptance

OFFER

DAY BEFORE

FIRST WEEK

BEYOND ...

MONTH PRIOR

START DATE

FIRST MONTH

CONGRATULATIONS!

You've landed a phenomenal fit for your team. A detailed, well-executed pre-onboarding plan can't be overlooked and will help ensure a smooth transition from offer acceptance to start date and beyond.

- **Positively reinforce:** After an offer acceptance, it's important to have critical members of the interview team — including a senior leader if possible — reach out to the candidate to congratulate them again and express your excitement about their acceptance.
- **Keep the momentum:** Quickly set the wheels in motion for final hiring activities such as background checks and drug screens. Even if they don't start immediately with your team, new hires often wait until these boxes have been checked before resigning from their current organizations.
- **Stay close:** Monitor their resignation process, and do so via video. Saying “yes” to an offer is relatively easy for virtual candidates — in contrast to the difficulty of also uprooting themselves and their families to relocate for new opportunities. Staying close to your hired candidate through video conversations will enable you to not only hear the ongoing commitment in their voice, but to see it in their facial expressions as well.

One Month Prior (Part I)

OFFER

DAY BEFORE

FIRST WEEK

BEYOND ...

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- **Communicate, communicate, communicate:** Continue to check in with the new hire early and often in the days leading up to their start date to ensure that everything's on track — and that they're receiving the support they need during this critical transition. As much as possible, check in via videoconferences instead of basic phone calls.
- **Determine and send the right onboarding materials:** Sharing onboarding materials well before a new team member's start date enables them to grow familiar with the content and technology — and to troubleshoot any issues early. Typical onboarding materials include:
 - employee handbooks
 - a detailed onboarding schedule
 - an organizational chart with colleagues' contact information
 - laptop, software and cellphone or other devices
- **Send a swag bag:** Delivering useful promotional items will make your new hire really feel like they are a part of the team. Branded apparel is typically most common, but simple things such as water bottles, portable chargers, pens and notepads are also appreciated.

One Month Prior (Part II)

OFFER

DAY BEFORE

FIRST WEEK

BEYOND ...

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START DATE

FIRST MONTH

- **Send semiconfidential work materials:** Delivery of recently developed team content, project materials and meeting minutes will help your new hire feel part of the inner circle and get up to speed quickly. While you never want to send truly confidential information ahead of an official start date, sending semiconfidential material will help your new team member stay committed to the offer acceptance.
- **Continue to build the personal relationship:** While you may not be able to physically take the new hire to lunch or dinner depending on your locations or circumstances, you should nevertheless find ways to continue to build the personal relationship through regular communication and video introductions to colleagues they didn't meet during the hiring process.
- **Send a Week 1 welcome email:** The week before your new hire starts, send an email that outlines what to expect on day one and during the first week. We've included a sample onboarding email on the following page (candidly, it's ours and it's really good).

Sample Onboarding Email

OFFER

DAY BEFORE

FIRST WEEK

BEYOND ...

MONTH PRIOR

START DATE

FIRST MONTH

[Download your copy now](#)

It's about that time, Isabel ... we're eagerly awaiting your virtual arrival on Monday morn. Gonna be great!

You will officially get underway with our weekly all-staff Zoom videoconference at 8 a.m. Monday, when this teamwide meeting will kick off with our CEO Chad announcing your arrival and asking you to provide a 30-second self-introduction to the Charles Aris team. (It's no biggie, and I know you'll do well with that brief intro ... just didn't want it to catch you off guard!)

After that 8 a.m. all-staff Zoom meeting, you and other newcomers will begin your training on all things Charles Aris - and, later in the week, all things Research in our firm. (Please stay tuned for more details on that from Team Research, all CC'd). Your first few days will revolve around learning about our firm, our people and our process via Zoom. There's much to learn and we want to help set you up for success!

With that in mind, learning and development leader Brent has kindly copied your personal email address on all Day 1 onboarding calendar invitations, including Monday's 8 a.m. all-staff meeting. In the meantime, here's an overview of the way you'll begin your first week here at Charles Aris:

Monday, May 11

- 8 a.m. - Attend our all-staff Zoom videoconference, a.k.a. the Monday Morning Meeting, which will kick off with some weekend-oriented chit-chat followed by your 30-second self-intro to the team
- 9 / immediately following - Zoom with HR specialist Becky to follow up on documentation for your internship
- 9:30 - Onboarding overview with Brent
- 9:40 - Intro to Charles Aris University (CAU) with Brent
- 10 - Intro to Charles Aris Inc. with Brent
- 11 - Intro to Knowledge Management with marketing and digital manager Joe
- 11:30 - Intro to Charles Aris culture with COO Allen
- Noon - Lunch on your own or in the Charles Aris virtual lunch room
- 1 - Technology orientation with office manager / I.T. liaison Julie
- 2 - Our 14-Step Priority Search Process with Brent
- 3 - Our 22 Principles with Chad
- 4 - A Guide to Understanding & Speaking Arisese with Brent
- 5:00 - Wrap up your first day with a zoom call with your mentor, Ashley.

Please do not hesitate to let me know if you have any questions over the weekend - feel free to text or call my mobile phone at ###-###-####.

Otherwise, we'll see you in the Zoom room at 8 a.m. Monday!

Brian



One Day Before

OFFER

DAY BEFORE

FIRST WEEK

BEYOND ...



MONTH PRIOR

START DATE

FIRST MONTH

Simply call: This one is easy. The day before they start, contact your new colleague in real time to express continued excitement that they're coming aboard — and to confirm that they have everything they need, everything is working correctly, and that they know the agenda for day one.





Start Date

OFFER

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FIRST WEEK

BEYOND ...

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FIRST MONTH

FIRST IMPRESSIONS MATTER

Here are some best practices to ensure your new team member's first day puts them on a path to success.

- **Batch start dates together:** Strive to have multiple new hires start on the same day and go through onboarding together. This creates a natural bonding experience that will help retain new team members.
- **Welcome in person if possible:** When feasible, ask your new colleague to start on a day when they can join the team in person. While this may not be possible for every virtual new hire, there's no better way to build early camaraderie than to do so face to face.
- **Review the onboarding schedule:** At the beginning of the first day, make sure your new hire has a video chat with their manager to review the onboarding schedule in detail.
- **Send study materials:** Be ready to share any extra study materials to fill any potential downtime. Sharing this content on day one will help the new hire fill time gaps which inevitably occur.



First Week

OFFER

DAY BEFORE

FIRST WEEK

BEYOND ...

MONTH PRIOR

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- **Integrate your new hire into the organization's culture immediately:**
 - Scheduling any or all meetings via video will help build strong personal connections quickly.
 - Assign a virtual welcome buddy or mentor (likely someone at your new team member's level). Provide a formal schedule for the two of them to connect regularly and place it on their work calendars to ensure that they do so.
 - Be sure to include your new hire in appropriate virtual happy hours, lunch dates and / or coffee breaks.
 - Prepopulate your new colleague's calendar with key meetings. They'll likely feel left out if they learn they missed an important event during their first week.
- **Identify key projects as early as possible:** Quickly assigning a project for your new hire to tackle can help ensure that they're effectively integrated into the team — and gives them an opportunity to immediately contribute and add value.



First Month and Beyond ...

OFFER

DAY BEFORE

FIRST WEEK

BEYOND ...

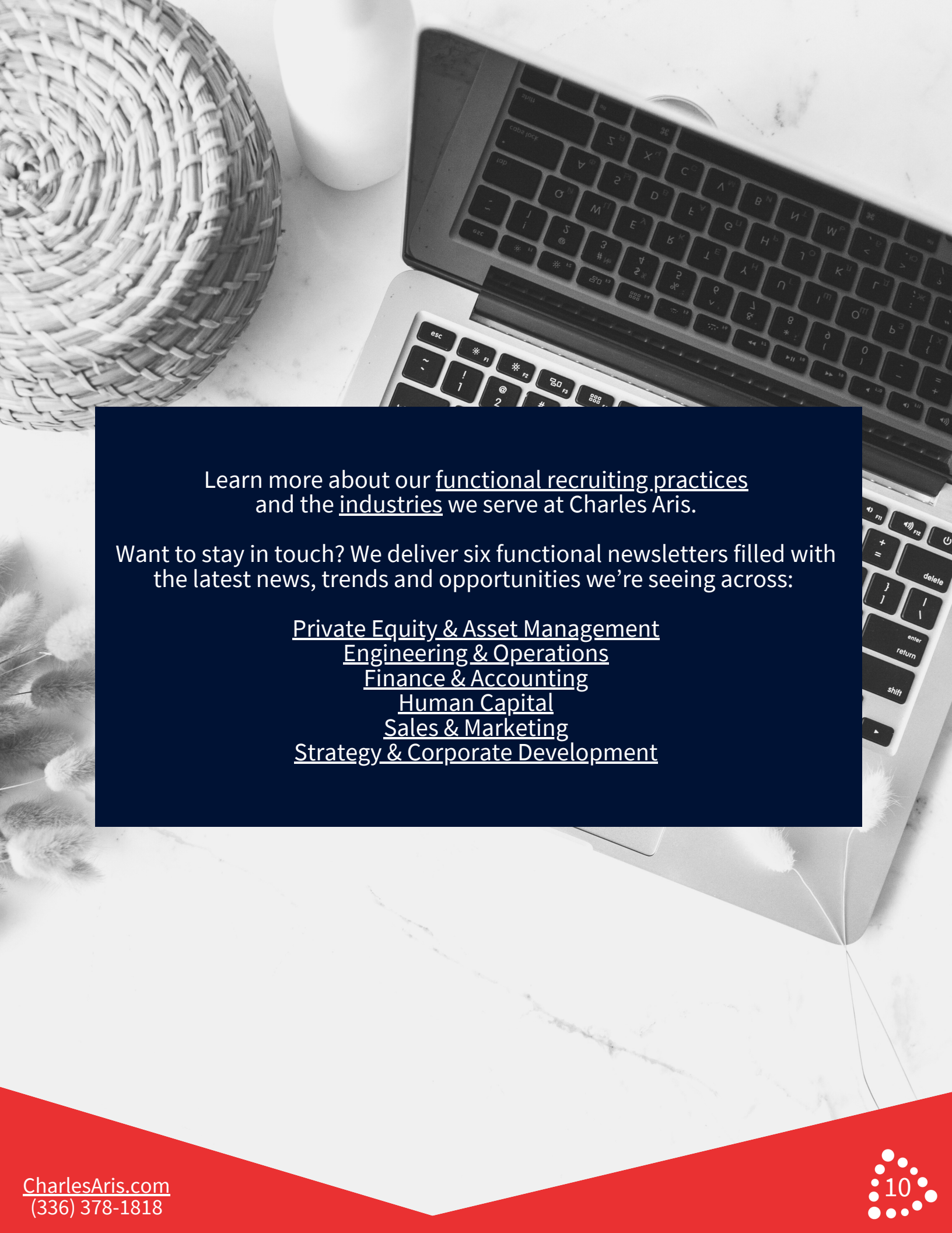
MONTH PRIOR

START DATE

FIRST MONTH

Extending your onboarding process well beyond the first month is key to a new team member's long-term success in your organization. Many onboarding schedules stop before or at the one-month mark, which can lead to loneliness for remote hires. Here are some ways to avoid that:

- **Keep the video calls going:** Videoconferences aren't just for onboarding; they should be leveraged in nearly every real-time interaction that your new hire has with other members of the team. Shifting to voice-only calls may degrade the positive relationships which have been cultivated in every direction.
- **Encourage your new team member to visit in person if possible:** When feasible, on-site visits for critical in-person meetings and social events help ensure that your new hire stays engaged and feels like a true part of the team.
- **Set up a strong feedback loop:** Official check-ins with your new hire at 30, 60 and 90 days enable all to adjust as needed. Some key questions to ask:
 - Is the job progressing as you expected?
 - Are you receiving the support necessary to be successful in your role?
 - What, if anything, would enhance your ability to be successful here?
 - How are you integrating with the team? How are they supporting you?
- **Seek feedback from your new hire's mentor:** Touch base frequently to learn how things are progressing from a veteran's view. These conversations can help ensure your new hire's development and remove any unnecessary hurdles.



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