



**MASON ALEXANDER**

The Ultimate Guide to  
Remote Onboarding



During these unprecedented times, many organisations have been faced with a very sharp transition to remote working. The future of work is remote working - the ability to provide flexible and remote working to your employees is imperative in this climate as we see shifts towards technology and automation. Flexible working is a huge factor in attracting talent – it is ranked high amongst our candidates, and often valued higher than salary when considering a new role. Remote working is cost effective for both employer (in terms of overheads) and employee (transport, work wardrobe, lunches etc). Other benefits include, providing a greater geographical reach for customers, allowing the ability to attract talent that need flexible working in order to thrive (for example those with disabilities, working parents etc), less commuting time etc.

One of the main roadblocks that businesses stumble across is onboarding. How do you ensure a smooth onboarding process for your employees? We have compiled a list of what works best based on tried and tested methods by our clients.



### Paperwork

Using tools like **DocuSign** will help speed up processes when it comes to onboarding. Some HR software tools such as **Bamboo HR** allow employee self-onboarding by sending the employee a new hire packet. Ensure this is all done before the employees first day – to include personal contact details, bank details, next of kin etc.



### Before they start

Talk to your employee regarding their work set up, what do they need in terms of IT, equipment etc. Consider items such as wifi, computer, stand, monitor, phone etc and ensure it is shipped to them in plenty of time for their start date.



### Care Package

We also recommend sending a care package, this can include promotional items such as coffee mug, phone charger, USB and any branded stationary they will require – notebooks, pens etc.



## Physical Set Up

We recommend creating a 'How to guide' from IT on how to get each item set up, as well as booking in a video call and screen share on their first day with IT to ensure phones, computers, systems etc are all connected. This is also a good time to ensure all access required such as logins and passwords are all working. A session should cover off how to use the company email, any group messaging channels, file sharing, computer security, video conferencing solutions and phone applications.



## First Day

Send the whole company a short bio on the new joiner, including a photo, where they have previously worked, where they are from etc. If you use a company-wide communication channel such as Slack or Microsoft Teams, start a welcome thread for the new joiner where staff can comment on the post to welcome them to the team.

Once IT is complete, a video call with HR should be the next step on Day 1. Any induction items should be covered off on how things work in your organisation as well as covering an outline on organisational structure and teams, company values etc. Send an electronic version of your company handbook for them to review.

A meeting with their manager & team is essential on day one.



## First Week

During the first week, we recommend an onboarding call with some of the executive team to learn more about the history and vision of the company.

Meeting as many people as possible over video calls is great during their first couple of weeks to find out more about each person and division in the company. Mini sessions can be done with each department and how they can help such as sales going through their process, accounts discussing payroll, expensing etc, IT running through systems etc.

If there is a company / team wide meeting in their first week, be sure to include a welcome note on the agenda to officially welcome the new joiner to the company.



## Training

It is expected that the first couple of weeks are going to be heavy with training sessions, don't overload them on their first day! Book in training sessions gradually across their first 2-3 weeks. Give them time after each session to process and test the information provided. Follow up after each session for any questions they might have.

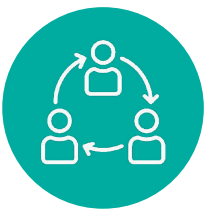
Building a central data base with 'how to guides', videos and company documentation for the new starter to revert to can be very helpful. SharePoint and Google Drive can work well for this if your company database does not have the capability.



## Communication

With remote working, remember - communication is KEY! Keep in regular contact with your new hire to ensure barriers don't break down. Make sure to check in frequently, particularly in their first few weeks.

For video calls we recommend Zoom, Teams, and Skype, Slack is also great for internal communication.



## Managing your team

Some organisations have hesitations over managing their teams remotely. One thing we find that works well is morning stand ups. Teams check in over video each morning to run through the main items on their agenda for the day and any issues they are facing. This helps provide the team with information on what everyone is working on, ensure there are no duplications of work, assists people in helping each other where they can and also provides employees with accountability for their workday. Some teams opt for an afternoon check in too, to see how their day and workload is progressing.



## Task Calendar

Share a task calendar for employee and manager for their first few weeks to include long and short term goals. This helps everyone to stay on top of objectives as well as tracking progress.



## To Do List

Providing a to do list for the new starters in their first few weeks can be a good way to keep engagement and for them to monitor their own progress. Include items such as meetings that have been set up with each department, team, buddy etc. Include the training sessions to include systems training that they will be covering off and let them check them off as they progress through them.



## Social

Social isolation is one of the main concerns when it comes to remote employees. Don't be afraid to pick up a video call as opposed to typing an email as it replicates the more typical "office" environment. While it is great to have lots of calls set up for business related items, it is important for people to have general chats too – how is your day going, watching anything good on Netflix, what are your plans for the evening? Don't just stick to work chat!

There are some great apps such as [Donut](#) and [Random Coffees](#) for 'water-cooler type chats' where employees are randomly assigned to have an online social meet up. They can grab a coffee (donut optional!) and set aside 15-20 minutes to catch up similar to the real-life scenario where you bump into different colleagues at the water cooler.



## Wellbeing

Promoting employee wellbeing while remote working is hugely important to eliminate any feelings of isolation that may be associated with working remotely. Stretching/yoga classes, mindfulness sessions and other group activities can all be held over zoom. These can be optional but help employees to stay engaged. Creating an exercise channel in Slack / Microsoft Teams can be good for promoting getting outside, employees can share home workout tips and experiences.



## Fun

Remote working on your own doesn't mean you can't have fun! Lunch time games on apps such as **Kahoot** and **House Party** is great for socialising across teams. Holding an end of week wrap up meeting with optional beer and wine can create that 'Friday Beers' feeling if staff aren't physically able to go for a social drink after work.

Some other activities that can be included for new joiners are fun facts when they start. Get new joiners to write 10 interesting facts about themselves in their first week and post on a channel in your internal system. It is a great way to learn about fellow employees and perhaps bond over similar interests, similarly to how you would in an office environment.



## Buddy System

Give the new joiner a buddy or mentor and set out weekly check ins for them to start out. This is a more relaxed way for the new starter to ask any questions about any uncertainties they have and for the buddy / mentor to fill them in on how things work. Ask a few team members to start a chat with them in their first few days too.

While onboarding someone remotely might seem daunting at first, there is ample technology out there to ensure the process runs smoothly.

Always ask for feedback on how their onboarding experience was and could anything have been done better so your process can only improve.

We hope these tips help, let us know if you need any help getting your team set up remotely!

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