Webonboarding:
Eight ways to improve remote onboarding

How to adapt your processes for onboarding new hires remotely

webonboarding

always exceed expectations

Challenge of change

The way we manage new hires needs to change.

As more HR, hiring teams and recruiters are operating remotely and increasing numbers of roles are for home-based positions, we need to adapt to the changes.

So many of the processes that work for an office-based HR team become unwieldy and ineffective when used to handle the additional demands of remote onboarding.

This guide is designed to help you handle this change. To find ways to adapt and improve your onboarding process so that it's future-proofed for today's working environment.

What is remote onboarding?

Remote onboarding is a way to process new hires starting a role that removes the need for a physical office to act as a 'hub' for communications, document exchange and data storage. It allows everything to be handled using digital communications and cloud-based tools and processes.

What are the remote onboarding challenges?

For most HR teams, the changes that have taken place as a result of the pandemic will require adjustments to the employee onboarding process. The restrictions have served as a kind of 'stress test' to highlight some of the weaknesses with traditional paper-based and manual approaches.
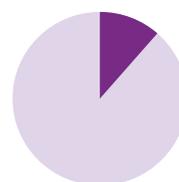
It's important to manage the changes because ineffective onboarding comes at a considerable cost. A 2019 survey by Webonboarding found that:
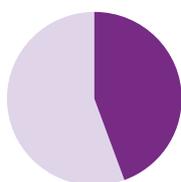
**46% of UK employees have experienced negatiave onboarding experiences**

11% of these rejected the role before job start date

10% left the role within their first 10 weeks

Any existing problems with a process will be magnified by the additional demands of remote onboarding. Rising dropout rates mean more time and resources wasted, as well as the long-term disruption that 'turnover' creates.

Conversely, the study found that:
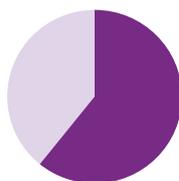
63% said a positive onboarding experience made them committed to a role

So how can you make your onboarding experience more positive in a remote working world?

Eight ways to improve onboarding

Adapting to remote working can be daunting as it involves some fundamental changes to the way our organisations operate. But with the right planning, tools and support, it's a transition that can be easily handled.

Here are eight strategies to help handle the move to virtual onboarding:

1. Map your process

To get an overview of what needs to change, you need to first review your existing process. From the moment a successful candidate is chosen, what steps do you take to convert that person into a productive employee?

This may include:

- **Contractual agreements - contracts/offer letters**
- **Reference checks and screening procedures**
- **Company information - packs/brochures**
- **Compliance policies - GDPR, health and safety etc**
- **Company background - history/story/ethos**
- **First day/week administration - setting up accounts, allocating kit etc**

For each of these steps, you need to identify how it's done and who's responsible. Is the information emailed or posted? Or is it left until the new starter begins their role in the workplace?

Once you have this 'roadmap', you can start to look at how well each of these processes works if:

- **A hiring team has limited, or no, access to a central office**
- **The new starter is working from home with no workplace attendance**

While some processes may handle this transition, others will require a rethink. The most problematic areas are processes that rely heavily on office-based communications, tools and access to information.

2. Manage communications
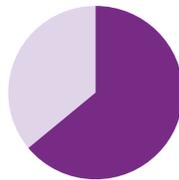
68% of HR teams use manual onboarding methods (email/post)

Good communications are the key to effective remote onboarding. With a traditional onboarding approach, so much of the internal communication is carried out face to face and within an office. People can chat, share information and easily hold meetings. Externally there may be little or no communication between offer and day one outside of the sending and returning of documentation, often because of a lack of planned contact points along the way.

With a remote working team, all of these communications require a fresh approach. They also have to be structured and made a formal part of the onboarding process.

To manage this, it's a good idea to break down exactly which communications are required and to examine the best tools to use for each task. The range of onboarding communications will include:

Onboardees	**Managers**	**Task Managers**
Congratulations	Tasks	Tasks
Infomation received	Reminders	Information
Confirmation	Notifications	Reminders
Welcome	Prompts	
Manager introduction		
Team introduction		
Feedback		

There's a multitude of ways that remote communications can be handled, both between HR team members and with the incoming workers. This could be emails, cloud-based document services such as Google Docs and Office 365 or a dedicated onboarding management solution such as Webonboarding.

3. Maintain compliance

A vital part of onboarding is ensuring that new hires receive everything they need to work safely, and you get everything you need to stay compliant. The way this is handled needs to be reviewed and adjusted for a remote onboarding operation.

Compliance can involve a wide range of documents, policies and agreements to cover:

- **Contracts/offer letters**
- **Health & Safety**
- **Data Protection**
- **Company policies**
- **Right To Work (RTW)**
- **Screening**
- **Equality info**
- **Medical checks**
- **HMRC/tax**

A reliance on a paper document creates problems when remote onboarding. Documents have to either be posted or sent as a PDF and printed by the recipient. It creates a slow and ineffective process.

Many new starter documents require the candidate to mark or sign that they have been received, read and understood. This will typically be completed with tick boxes and an ink signature. There is also a lot of repetition involved in new starter documents, often the same personal information like name, address and date of birth has to be entered over and over again.

Two-thirds (66%) of new starters still receive paper contracts
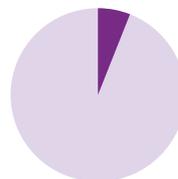
Just five percent currently use digital signing for contracts

Wherever possible, online tools should be used to handle new hire documents. Electronic signatures allow documents to be signed virtually, with no need for paperwork to be printed or posted and online systems, like Webonboarding, enable you to track and audit that the process has been completed.

5. Team building

The starter experience for a remote worker is very different from that of an office-based employee. This needs to be reflected in an onboarding process that's designed to meet the specific needs of a remote worker.

The new starter has none of the 'organic' experience that comes from being within a workplace and acclimatising and socialising with colleagues. Without adapting, onboarding can become an isolating and cold experience.
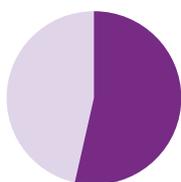
Data from 2019 showed that more than half (56%) of new starters had no introduction events or activities, adding to a poor onboarding experience.

An effective onboarding process will have the flexibility to cater for any kind of role - whether it's office-based, remote or a hybrid mix. For remote workers, planned communications and interactions are essential to building a bond with the employer.

Along with formal meetings with line managers and HR, less formal interactions need to be promoted to recreate the kind of chat and friendships that occur within an office.

Video conferencing and business orientated 'chat' tools such as Slack can prove effective ways to achieve this. Some methods used include:

- **Virtual team lunches**
- **Video welcome messages**
- **Online 'pub' quizzes**
- **Virtual tea breaks**
- **'Welcome' picture gallery**

Implementing a virtual 'buddy' system is also an effective way to build connections with remote workers. This is particularly effective when used during onboarding to help provide a more personal and reassuring experience outside of the typical management structure.

6. Early weeks plan

Extra care needs to be taken when onboarding a remote worker to reduce the anxiety and stress that comes with starting a new job. With an office-based role, much of this fades away once a job starts and the person has the help and support of colleagues.

For a remote role, it can be much more of an isolated and stressful experience with people drip-fed information from above. To help alleviate this, an early weeks plan can significantly improve the experience.
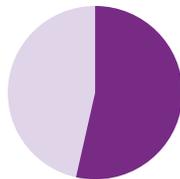
55% of employees say receiving info early is key to positive onboarding

This could be in the form of a document which maps out what the person can expect to happen during their initial weeks. This is sent to them before they start, to let them know exactly what to expect.

This can cover:

- **What's going to happen/when?**
- **Internal meetings**
- **General training sessions**
- **Team introductions**
- **Social events/activities**
- **Starter tasks/assignments**

It's important to balance the need for good communications with the dangers of overloading a new starter with information. Keep it simple.

7. Success planning

The ultimate goal for any onboarding approach is to deliver productive employees that add value to your organisation. But how do you quantify what success is?

It seems simple but this is an aspect of onboarding that often gets missed. It's simply setting from the start what you regard as a successful employee. It's about communicating your expectations and providing a new starter with motivations and opportunities.

This can include:

- **Setting goals and objectives**
- **Providing training and support**
- **Identifying cross-functional skills**
- **Providing incentives and rewards**

It's particularly important to build these kinds of wider goals and opportunities for remote workers. One of the risks is that their role becomes too task orientated with them having no 'big picture'. A new starter should feel as if they are at the start of an exciting journey.

8. Reporting and feedback

With revisions and changes being made to the onboarding process, you need to have ways to monitor their effectiveness. To do this, feedback and performance tracking needs to be built into your process.

With a remote role, it's much harder to get a feel for how a new starter finds the experience. If they have any frustrations or concerns, they are unlikely to offer them up without prompting.

Feedback needs to be received from onboardees to identify any problems and suggest potential improvements that can be made. Feedback is also needed from managers - how well did the new starter integrate?

Key Performance Indicators

The use of automated digital processes provides HR managers with the data they need to track performance over time. The simplest indication of onboarding performance is how long it takes to bring a new hire in.

Key Performance Indicators can be used to monitor everything from task completion rates to more qualitative ratings provided by new starters.

Managing change to remote onboarding

The rapid move towards remote working has been brought about by unprecedented events. But alongside all of the challenges, there are opportunities to explore better ways of managing the new hire onboarding process.

By moving away from our traditional office-based tools and processes, we can start to benefit from more agile, flexible and remote-friendly ways of working.

Webonboarding is a cloud-based system that transforms the new hire process. It removes any need for printed or posted paperwork with everything managed via an online portal.

With real-time tracking and an automated onboarding checklist, a remote hiring team can manage the process virtually from wherever they have an online connection. With reduced administration, the focus can be placed on improving the experience for new starters.

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