

How to Onboard Remote Employees Really Well:

Free Checklist
Template

To stay competitive for top candidates and to advance DEI goals, tech companies continue to embrace remote working environments. Hired survey data indicated nearly 90% of candidates wanted a remote-first or fully remote job. However, as companies evaluate the employee experience, it presents a suite of new challenges. Onboarding is chief among them.

On the Greymatter podcast, Zapier CEO Wade Foster explained how difficult it is to hire and onboard employees, even for a company that's been remote from day one. It's even harder for companies just making the transition because there aren't perfect remote analogs for every existing process.

HR teams and supervisors keeping up with this trend have to reinvent their onboarding processes to remote employees. Let Hired lend a hand. This checklist offers steps to follow at different points of onboarding.

Before the First Day: “Pre-boarding”

Planning

Planning for the new employee’s arrival shows you value them and maintains a positive employee experience. There are plenty of things you can do before the employee’s first day, such as:

Determine an onboarding buddy. Clear the assignment with the buddy and their manager, if applicable. The buddy should understand your new hire’s department workflows and company culture. Try to match your hire with a buddy who works during similar times.

Create a list of people the employee should know on the team and across teams. Prioritize it by setting up a few meetings on their calendar for them. This will give a little structure to their day from the beginning and they can schedule the rest.

Add them to any standing meeting calendar invites.

Review any existing onboarding documents or plans and revise accordingly.

Related:

[How to Onboard Tech Engineers Onto Your Team \(Free 30/60/90 Template\)](#)

Documents

Complete pre-hire documents digitally using an e-signature tool like DocuSign. Email your new hire a PDF one-pager giving an overview of your company, including your mission, values, and goals. Keep this document short and to the point – you can go deeper on the first day.

International Onboarding or New Hires Across Borders?

Remember to follow employment and tax laws for your employee's country if they're international. When in doubt, use a global HR solution for help with compliance like [Oyster](#) or [Remote](#).

Related:

[Want to Hire a Globally Distributed Team? 4 Ways to Get Started](#)

Expectations

If you haven't covered this in the offer letter or earlier discussions, be sure to give them a heads up on expectations. These may include working hours, response times for various communication channels, and how your team uses them.

Schedule

Work with your new hire to establish a realistic and manageable work schedule to set expectations ahead of their start date. Encourage a flexible working schedule to [give them a more equitable work environment](#).

Dropbox established what they refer to as “core collaboration hours” to standardize working together across multiple time zones. It helps align the company and provides a better employee experience. This way, a San Francisco-based manager doesn't expect a New York-based co-worker to attend a meeting at 7:30 pm, New York time.

Engineering Manager Thomas Le Jeune described them this way:

“It's been a really clear policy from the company. It's a block of four hours shared across the entire North America region. For Pacific time it is from 9 to 1 p.m. For Eastern time it's from 12 to 4 p.m.

The goal here is to have one central block where everyone is expected to be there and after that it's really up to you. You can start early, you can leave right after. If you have a doctor appointment, resume the work later. It's really a mix between discipline and flexibility.”

Communication

Share the communication channels used by your team and company. Explain what each is for and when to use them. This could be a one-sheet or a part of a simple onboarding deck describing “welcome to X team - here’s how we work.”

Supply a communication plan or workflow explaining who your hire should contact in different situations and what channels to use. When it comes to communication channels, determine:

When is it appropriate to email, Slack, or set up a meeting?

What’s the preferred meeting tool? Zoom, Google Meet, Slack Huddle?

If you set up a meeting, are there protocols, such as making the invitation open to edits or proposing alternate times? When does a meeting necessitate an agenda?

If you’re ill or need to step away for an hour or more, who’s the person to notify and how?

Shipments: Hardware & Swag

Ship any necessary equipment, such as a laptop and peripherals, as far in advance as you can to account for delays. It is better to have your hardware arrive early than to leave your employee without equipment on their first day. Equipment management companies like [Growrk](#) can handle all this for you.

If you give your hybrid or collocated employees a welcome package with personalized swag or other gifts, ship your remote employees one in the mail. It keeps the excitement momentum going. Companies like [Swag](#) make this easy.

Day One: Onboarding Begins

Access to Tools, Company Information

Add your employee to communication and project management tools like Slack and Asana. Grant access to any password management tools like [1Password](#) or [LastPass](#). Have them set up any of your required security measures for those accounts, such as two-factor authorization.

Consider using a tool like [Tetra](#) to create a wiki with instructions for new hires to reference. Use a video recording tool like Loom to explain company-specific processes and plugins. There's a lot to take in and a Loom or other knowledge management system provides consistency and a handy resource for new employees.

Provide a digital orientation giving an in-depth overview of your company, establishing role expectations, and explaining the onboarding process. Send any orientation documents over email, and discuss them over a video call. Invite them to keep a running list of questions to review together. You may also consider using a tool like Loom to [send welcome videos](#) to new employees.

Share an organizational chart showing who on your team works in what role. If you have a hybrid workplace, note who works remote and on-site.

In the office, most teams treat the new employee to lunch on the first day. Plan something virtual, if possible. Make it a lunch or happy hour event, depending on overlapping time zones. Send a gift card to DoorDash or Grubhub via email. Just remember, it's important to connect socially, as well as technically.

The First Week: Getting Warmed Up

The first few days can be hectic! Be mindful of the tasks involved with the onboarding process and give the new employee room in their schedule to complete any paperwork or onboardings for other departments. New employees may need to set up a dev environment or additional remote tools to do their work effectively.

1:1s with the Manager

Take this time to review procedures on data security and cybersecurity while working remotely.

Also plan to review and collaborate on their onboarding plan.

The manager should focus on connection and support during these touchpoints to promote their hire's professional growth. If you haven't already, schedule weekly supervisor 1:1s moving forward. Tools like [Lattice](#) and [15Five](#) make it easy to facilitate these calls.

This is also a great time to get feedback from your new employee on the onboarding process overall and the [30/60/90 plan](#). This document outlines the onboarding process, your hire's personal growth goals, and their KPIs for professional success.

The First Month: Hi, Everybody!

During the first team meeting, make a company-wide introduction. Ask your new hire for some details to share, like hobbies or pets' names, to personalize it a bit.

Some companies maintain a digital “yearbook.” Each new employee is asked to submit a photo and a couple paragraphs about themselves. This might include family members, interests, or passion projects.

Provide plenty of opportunities for social connection. Integrate “ice breakers” into larger team or cross-functional meetings when possible.

Set up virtual coffee breaks with employees at a similar seniority level. If applicable, introduce your hire to team members who live in their area. If you use co-working spaces, encourage them to explore them.

Facilitate scheduling any remaining 1:1s with key team members to get to know each other. These touchpoints can be asynchronous or over video calls, depending on both employees' schedules.

Establish a supervisor 1:1 after the first 30 days to review 30-day goals from the 30/60/90 plan. Celebrate any wins and move unfinished goals to the 60-day list.

The First 90 Days: 3-2-1-Liftoff

Consider lowering the frequency of supervisor 1:1s to biweekly or monthly after the first month. Check in with your hire to see how often they need the support.

During your hire's second month of employment, look for opportunities to integrate them into current projects. Keep providing guidance, but let them do more independent work.

Conduct a 60-day assessment as part of the 30/60/90 plan. Ensure your new employee understands your company, team, product, and work. Schedule any further support in the next 30 days.

Once you reach your hire's third month of employment, encourage them to take ownership of their assigned initiatives. Find ways for them to take part in discussions about larger projects' timelines and estimates.

To wrap up the 30/60/90 plan, conduct a final goal review after 90 days. Ask your new team member if they've achieved all their personal goals set as part of the plan. Then, brainstorm strategies for achieving any leftover goals moving forward.

Conduct a stay interview to evaluate how the onboarding process helped your employee. Ask what elements of onboarding they found useful and what parts they didn't.

What's a 'Stay' Interview?

Most people have heard of an 'exit' interview. A 'stay' interview evaluates a different stage of an employee's journey. It tries to capture why employees stay - and what might cause them to leave.

These should be casual, taking around 30 minutes. By now you should have a pretty good idea of the employee's feedback on the

onboarding process. Use this time to really listen. As the 'honeymoon' phase of a new job wanes, keep the positive employee experience going with thoughtful questions and responses.

The goal isn't to put anyone on the spot. Invite them to think about their feedback if needed and reply asynchronously. If action items come from the stay interview, get them done.

The First 6 Months: Cruising Altitude

Set up a final onboarding check-in to evaluate how your new team member has integrated into your company. Ask them how their work with other team members has been going. Look for any other work opportunities they can claim ownership of.

Keep promoting social activities like company-wide events and team get-togethers. Continue to provide opportunities for casual and 1:1 conversations with colleagues to maintain an inclusive environment.

Ask for final feedback on the onboarding experience using a survey. Include fields to suggest ways to improve your onboarding process. Remember, onboarding in many roles may take up to a year.

Onboarding Tips

Keep your onboarding resources self-serve wherever possible. Present information in wikis, Trello boards, and other easy-to-access formats. This approach to onboarding materials lets employees learn on their own time and reference information as they work. It also provides greater consistency in the process if everyone gets the same information.

Avoid using employee surveillance tools on remote team members, even when they're onboarding. According to Hired's Senior Vice President of People Strategy, Samantha Lawrence, these tools undermine employee trust.

Onboarding is a team effort. Get a variety of voices involved in training, including recently onboarded hires.

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