

Checklist

New Hire Virtual Onboarding Checklist

PURPOSE OF THIS DOCUMENT:

The goal of **virtual employee onboarding** is the same as in-person onboarding. It helps your new employee get familiar with your company, makes them feel welcomed and included, facilitates connections with the team and provides them with the tools and training they need to start making an impact sooner.

The only difference is that virtual employee onboarding is accomplished through video conferences, webinars, pre-recorded videos, text resources, instant messenger and interactive online training that new hires can access through their desktop, laptop or mobile device.

Gamify your onboarding sessions with polls, mini-quizzes, Zoom breakout rooms and ice breaker games to make onboarding information stick.

This document will assist you in creating the right “first impression” and enable you to fast track your new employee to competency.

The onboarding process should be facilitated by Human Resources (HR) with support by the Line Manager.

Employee Name	
Position Title	
Start Date	

ONBOARDING TEAM

- *Line Manager*
- *Training Specialist - if applicable*
- *Human Resource Practitioner*
- *On-boarding Buddy*

* Update accountabilities table to meet your company context

PRE-HIRE			
Action	Accountable	Date	Status
Before their first day: <ul style="list-style-type: none"> • Have the new employee complete new hire paperwork 	HR	4 weeks before the start date	
Prepare onboarding materials for your new employee including: <ul style="list-style-type: none"> • Email welcome letter • Company announcement • Company electronic promotional material (e-mag, newsletter) • Relevant new employee documentation (including <u>all</u> new employee onboarding paperwork, policies, procedures etc.) • Update all relevant company contact lists & email distribution lists to include new employee • Team contact details • Prepare induction calendar for the first three months, • List scheduled stakeholder meetings for the first 2 weeks • List essential online training • Departmental meetings and events • Links to company intranet/ websites 	HR	4-6 weeks before the start date	

<p>Appoint an *onboarding buddy from within the team. *A buddy should be an effective communicator, capable of providing the necessary information to the new employee, to support their smooth navigation of the work environment. The buddy can use his or her knowledge of the workplace culture to assist the new employee in getting a head start on networking.</p>	Line Manager	4-6 weeks before the start date	
<p>Arrange with the IT Department to set-up the new hire's PC :</p> <ul style="list-style-type: none"> • Pre-load any required software and systems • Set up access to Network & Public Folders 	Line Manager/ IT	2 weeks before the start date	
<p>Schedule a virtual orientation with the IT team to get your new employee set up with their technology and software (e.g., login VPN, applications). Make this the first meeting of the new hire's day — especially since their only connection with your team will be through technology.</p>	HR	2 weeks before the start date	
<p>Schedule for Line Manager to “meet-and-greet” the new employee online at arrival on their first day</p>	HR	2 weeks before the start date	
<p>Schedule a one-hour meeting with their Line Manager on the first day for an introductory check-in meeting.</p>	Line Manager	2 weeks before the start date	
<p>Schedule at least a two-hour meeting with their Line Manager on the second day for a new employee Induction meeting.</p>	Line Manager	2 weeks before the start date	
<p>Schedule an introductory online meet and greet with the team. Preferably on the first day, but otherwise in the first week.</p>	Line Manager	2 weeks before the start date	
<p>Schedule a two-hour meeting for the new employee with the Learning and Development team to discuss online onboarding & job-specific training.</p>	Training Team	2 weeks before the start date	
<p>Schedule a two-hour meeting with HR to review their employee take-on documents and to answer any questions regarding benefits, salary, pay runs, leave, policies and other possible HR-related concerns.</p>	HR	2 weeks before the start date	
<p>Include the new employee in all meetings scheduled for general communication:</p> <ul style="list-style-type: none"> • Departmental/virtual team meetings 	Line Manager	2 weeks before the start date	

Deliver the work equipment (laptop, headset, monitor, etc). Include initial IT setup instructions to help them get logged onto their computer and work email for the first time.	HR	2 weeks before the start date	
Update all relevant email distribution lists to include the new employee's email address, position and details	HR	Week before	

DAY 1 – DAY 3			
Action	Accountable	Date	Status
Send a welcome kit (could include company merchandise, pens, notebook, coffee voucher etc.).	HR	1 day before the start date	
Virtual orientation with IT to ensure all IT applications and access are working correctly. Address any IT issues, answer questions.	IT	Day 1	
Virtual meet-and-greet on arrival. Tour of the virtual workspace.	HR	Day 1	
<p>Meet the team – meeting with the team to introduce the New employee to everyone virtually.</p> <p>Have the team go around and briefly explain what they do, including a fun fact about themselves. Help your new employee get to know the team in a more casual setting by scheduling virtual team lunches for the first week. You can also set up brief one-on-ones or small group video chats between the new employee and their coworkers to help them understand how they'll be working together.</p>	Line Manager	Day 1	
<p>First meeting with your line manager</p> <ul style="list-style-type: none"> Welcome What support do you need to get settled? High-level focus areas for work in the first month. Discussion of the expected induction activities planned for the week. Do you have any questions, concerns? Discuss scheduled meetings set up for the next few days 	Line Manager	Day 1	
Meet other teams.	Line Manager	Day 3	

<p>Line manager induction meeting. Prepare copies of the organogram, team goals</p> <p>Discussion topics should include:</p> <ul style="list-style-type: none"> • Organisation structure • Overview of the company's products and/or services • Team goals (team orientation, focus areas at work, work styles, communication styles) • Objectives, KPI's & goals: New Hire's performance requirements; how the success of the individual fits into the broader purpose of the team • Explain the New Hire's new job <p>Meet with the new employee once a week for at least four weeks, then reassess and ask whether the new employee needs less/more support from you.</p>	Line Manager	Day 3	
<p>Company induction meeting</p> <p>Suggested discussion topics should include:</p> <ul style="list-style-type: none"> • Company history • Business Strategy • How departments work together • Key external and internal customers (roles, support, expectations and challenges) 	Line Manager	Week 2	
<p>Meet the Learning and Development Specialist to discuss their onboarding programme for the next 3 months & job-specific training.</p>	Training Team	Week 2	