

7.4: How to Establish a Virtual Onboarding Program



Image Mohamed Hassan. [Virtual Meeting](#). PxHere.com. CCO Public Domain.

How to Establish a Virtual Onboarding Program

The COVID-19 pandemic has caused employers to switch up their hiring and onboarding practices. Whether you are hiring employees who will work remotely or welcoming new staff while you work from home yourself, the circumstances are quite different from what many of us are used to. Follow these steps to ensure a smooth process.

Step 1. Use Technology Effectively

Technology is the cornerstone of virtual onboarding, and ensuring that adequate technology is available to all employees is essential. Start with identifying needed software and providing hardware to new hires that includes the necessary network access and configuration for the individual to perform his or her job.

- Determine how the hardware will be delivered. Will it be mailed to the employee or will pickup be arranged?
- Identify and procure software that will enable employees to conduct and/or participate in virtual meetings and other onboarding tasks. Apps such as Zoom, WebEx and Microsoft Teams, which allow for video meetings with screen sharing and other collaborative tools, are popular options.
- Provide easy-to-follow printed instructions for setting up the hardware and software.
- Schedule a one-on-one virtual meeting for each new hire with a member of the IT staff to conduct the initial setup of the hardware and software and to troubleshoot any issues.

In addition to hardware and software needs, create digital versions of documents such as benefit enrollment forms, employee handbooks, etc. that were previously provided to new employees in hard-copy format. Ensure that employees have the technology to access this information and electronically complete required forms and/or acknowledgments.

Step 2. Design an Orientation Schedule

Onboarding employees is more than a one-day or even one-week event. In all circumstances, onboarding should be a strategic, long-term process coordinated with all levels of the organization. In our "new normal," however, it is necessary to create a virtual orientation program that will replace the in-person orientation that typically occurs during a new hire's first few days.

Start with determining how much time each day individuals should be asked to participate in online meetings versus working at their own pace reviewing policies, procedures, etc., and then create a schedule for the first week or days with detailed agendas. All members of the leadership team should be involved in the orientation schedule, and video introductions should be utilized as much as possible.

If the resources are available, create a series of short videos on training topics, which can be sent to the new hire each day to complement virtual sessions. Create training videos or PowerPoint presentations on common topics such as completing timesheets, using job-specific software, etc.

Step 3. Communicate Often

New hires often feel lost during the first few days at a new job, and physical distance can heighten this isolation. To lessen the impact of this for remote employees, be sure to:

- Touch base regularly and assign a co-worker as a buddy to be the point of contact for routine questions and frequent check-ins.
- Provide new hires with a "who-to-turn-to list" that includes names, contact information, and descriptions of each employee's role and responsibilities in the company.
- Ensure managers have the training and tools needed to communicate regularly with new employees to help replace in-person contact, and require managers to establish frequent one-on-one meetings.
- Communicate clear performance expectations during the orientation period and beyond.

Step 4. Focus on Engagement

Establish ways to keep new employees engaged with management and their team members, including:

- Starting each virtual meeting with a discussion question that each participant answers about how they are handling remote work, what they like most and least about telework, or how they are spending their free time.
- Encouraging coworkers to join virtual meetings with video to allow new employees to put faces to names.
- Organizing virtual happy hours where employees can interact with new hires in an informal and relaxed environment.
- Making engagement fun by quizzing other employees on information about the new hire and award small gifts or other rewards to encourage individuals to interact with new team members.
- Training each new hire's buddy on ways to engage with their new co-worker, and encourage socialization—from a distance, of course.

Step 5. Follow Up with New Hires

After the first day, reach out to the new hire to determine how the process is going. Because virtual onboarding is likely not a one-size-fits-all situation, find out what each person needs and/or wants individually to make his or her onboarding successful. Be willing to adjust practices when feasible to make each new hire's experience a positive one.

After the first few weeks on the job, send new hires a short [survey](#) about their orientation to the company.

Source: "How to Establish a Virtual Onboarding Program", Society for Human Resource Management (SHRM), 2024.

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