



Virtual Onboarding Toolkit

Successfully onboard remote employees and provide a positive experience every time.

Using This Toolkit

Adjusting your onboarding sequence for a virtual experience doesn't require a complete overhaul of your existing process. However, given the removed nature of remote work, it's vital that you actively work to modify the process to meet the new hire's individual needs and goals. Afterall, a strong onboarding program makes employees 18 times more likely to feel committed to their employer.

To help you make remote onboarding a success for each new hire, we put together a checklist of the tasks you must do pre-, during and post-onboarding when welcoming a new employee to your company.

We also share templates for collecting information from new hires and hiring managers throughout the onboarding experience to make sure it goes smoothly.

Use these templates alongside the checklists to ensure every new employee feels welcomed and supported despite starting their role virtually.

Pre-Onboarding



Step 1: Test Your Technologies

Before onboarding every new employee, ensure your remote onboarding tools are up-to-date and working properly. Companies regularly release software updates and modify their platforms to enhance the user experience. Ensure there aren't any outstanding updates that could hinder functionalities, and familiarize yourself — and team — with any and all new features.



Step 2: Send Your Communication Plan

A key part of a strong onboarding experience is communication. When transitioning to remote onboarding program, you should have created a communication plan for new employees with essential tasks and clear points of contact.

For each new hire, adjust the plan to include any additional onboarding tasks — like team-specific forms or trainings — along with upcoming culture or company-wide events. Additionally, ensure all designated points of contact are available and able to assist during the onboarding process. Once personalized, send the plan to the new hire prior to their first day.



Step 3: Bring the Manager Up to Speed

Since you won't be directly overseeing the new hire's transition into the role, you must ensure the hiring manager is well-informed and prepared. Train them — if they aren't already — in your onboarding software and tools.

Additionally, inform them of your communication plan so they're able to direct the new hire to the correct point of contact when they have questions and advocate on their behalf if speed bumps pop up.

During Onboarding



Step 1: Employee to Complete New Hire Form

Your remote onboarding plan is one-size-fits-all; it's designed to accommodate all learning styles and fit each role at your organization. However, every individual is unique and has specific needs. For example, 72 percent of employees say one-on-one time with their manager is the most important part of the onboarding process, however that may not be the case for everyone.

To accommodate the individual needs of each employee, have them complete the New Hire Worksheet during onboarding so direct managers are able to provide them with the best possible onboarding experience. Have managers set up time to discuss the employee's answers.



Step 2: Manager to Set Expectations

While a manager should tailor the onboarding experience to each new hire, the employee must also get acclimated to their manager's leadership style during the process. Have the manager complete the Manager Expectations form and discuss their responses with the direct report. This will outline communication styles, feedback preferences and address questions to better set the employee up for success.



Step 3: Track Onboarding Plan Progress

To ensure onboarding progresses as planned, set up three check-ins between the employee and their direct manager. These should take place on the first day, the halfway point and final day of onboarding. This gives the manager the opportunity to set and adjust expectations, and lets the employee regularly ask questions. Help them prepare and stay on track by sharing the Onboarding Checkpoints Worksheet.

Recreate and/or modify the following worksheet in a Google Form or your ATS so employees can complete it remotely. Have new hires complete the form so managers can personalize their onboarding experience.

First Name: _____ Last Name: _____

Job Title: _____ Department: _____

Location of Open Role: ☐ In-Office City: _____ ☐ Remote

How often would you like to meet with your manager in the first 30 days?

☐ Daily ☐ Weekly ☐ Bi-weekly ☐ Monthly

How would you describe your learning style? *Check all that apply.*

☐ Visual ☐ Hands-On ☐ Auditory ☐ Reading/Writing

☐ Other: _____

How would you describe your communication style? *Check all that apply.*

☐ Analytical ☐ Intuitive ☐ Functional ☐ Personal

☐ Others: _____

Do you prefer small groups or large groups when meeting new people?

☐ Small ☐ Large

How would you describe a successful onboarding experience?

Recreate and/or modify the following worksheet in a Google Form or your ATS so hiring managers can complete it remotely.

My managerial style is:

I expect all employees on my team to:

My communication style is:

My preference for giving/receiving feedback is:

During your onboarding process, I expect that you will:

Recreate and/or modify the following worksheet in a Google Form or your ATS so hiring managers and their direct report can complete it remotely.

Checkpoint 1: Day 1

- ☐ Manager has provided an overview of the onboarding process.
 - ☐ Manager has explained short- and long-term goals of onboarding.
 - ☐ Manager has reviewed the onboarding communication plan with employee.
 - ☐ Manager has provided the employee with all files, logins and resources needed to carry out job functions.
 - ☐ Employee has asked questions and feels confident moving forward.
 - ☐ _____
 - ☐ _____
-

Checkpoint 2: Day ____ (Halfway Mark)

- ☐ Employee is on track with learning and performance goals.
 - ☐ Employee feels confident with materials and skills learned thus far.
 - ☐ Employee understands their role responsibilities.
 - ☐ Employee is adjusting to company culture and getting to know colleagues.
 - ☐ Manager has outlined/reviewed key objectives for the remainder of onboarding.
 - ☐ _____
 - ☐ _____
-

Checkpoint 3: Day ____ (Final Day)

- ☐ Employee has met onboarding goals and is ready to assume all role responsibilities.
- ☐ Employee understands how to use necessary software, tools and databases.
- ☐ Employee feels connected to the organization and coworkers.
- ☐ Manager has provided feedback on employee's progress thus far.
- ☐ Employee has completed the Onboarding Feedback Survey.
- ☐ _____
- ☐ _____

Post-Onboarding



Step 1: Employee to Provide Feedback

Employee feedback is crucial to making your onboarding process as effective as possible. After each employee completes onboarding, ask them for their thoughts on how it went. While new hires should meet with their direct managers throughout the entire process, a post-onboarding survey allows them to provide honest feedback.

This insight can help your team optimize your virtual onboarding process and improve both the hiring manager's and your own involvement. Have the employee complete the [Onboarding Feedback Survey](#) as a final step to the onboarding process.



Step 2: Utilize Employee Feedback

Your remote onboarding sequence should improve with every employee that completes the process. As soon as you receive a new hire's feedback, review it with your team — and the hiring manager, if need be — to determine the appropriate steps to take.

It's to your benefit to act on employee feedback. Not only does it enhance the experience for future new hires, it also bodes well for your employer brand and positively correlates with retention: [48% of employees](#) claim that asking for their feedback and acting on it would help to reduce voluntary turnover.

Recreate and/or modify the following worksheet in a Google Form or your ATS so new employees can complete it remotely.

Please rank the following statements on a scale of 1-5 (1: Not True; 5: Absolutely True).

Role & Responsibilities

I know what my role responsibilities are.	1	2	3	4	5
I have the resources I need to do my job.	1	2	3	4	5
I feel confident in my abilities to fulfill my role responsibilities.	1	2	3	4	5
I know how my role contributes to the company's mission.	1	2	3	4	5
I know what my manager expects of me in my role.	1	2	3	4	5
I feel productive in my role so far.	1	2	3	4	5

Company Culture

I feel welcomed here.	1	2	3	4	5
I know and understand the company's core values.	1	2	3	4	5
I feel respected by my peers and coworkers.	1	2	3	4	5
I am proud of my organization's mission.	1	2	3	4	5

Process Overview

I am satisfied with how my onboarding went.	1	2	3	4	5
My training was helpful and informative.	1	2	3	4	5
I had the right amount of 1:1 time with my manager.	1	2	3	4	5
My onboarding process was organized and logical.	1	2	3	4	5
I feel my onboarding prepared me for my role here.	1	2	3	4	5

Please share any additional thoughts and feedback below.

Conclusion

Despite having a one-size-fits-all remote onboarding sequence in place, a virtual onboarding experience is vastly different from adjusting to a role in the office.

As a result, it's important that your team and the hiring manager go out of your way to make each new hires' experience a positive one.

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