



#### Who Should Read

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Chief Human Resources Officers

Chief Business Officers

Chief Information Officers

Senior Facilities Officers

Managers

# Manager's Guide to Remote Onboarding

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Tools to Orient, Educate, and Network Remote Employees

#### Ways to Use This Toolkit

- Create onboarding plans for remote new hires
- Support remote new hires with the tools and resources they need to be successful
- Meaningfully engage with remote employees throughout their first four months

# EAB Research

## Project Director

Lisa Berglund, MPP

## Contributing Consultants

Elizabeth Denny

Ronald Yanosky

## Managing Director

Ann Forman Lippens

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# Executive Summary

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## Remote Employees Require Early and Unique Supports

There are many benefits to hiring remote employees. On average, remote employees have fewer workplace interruptions, are generally happier and healthier, and are significantly more productive.

Remote workers can be **25%** more productive than their onsite colleagues

However, remote employees face unique challenges as well. In addition to an average of 13% longer workdays, remote employees struggle with:



**A lack of access to information**, with additional time and effort required to find answers from coworkers



**Social isolation** if there are not opportunities to connect with coworkers in a remote setting



**Communication issues** without in-person cues or background context



**Difficulty prioritizing and managing work** with less manager interaction

These challenges compound and affect employees most at the beginning of their tenure; one study of remote workers at 60 companies found that **more than half of remote employee turnover occurs within the first 100-120 days of employment.**

# Executive Summary (ctd.)

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## Five Principles for Onboarding Remote Employees

The good news is that managers can get ahead of some of these challenges with a thoughtful onboarding process. The principles below should guide the onboarding of remote new hires.

Principle	Rationale	Examples for Managers
Meet early and often.	For new hires to have sufficient access to information and an understanding of how to prioritize their work, managers need to invest in frequent communication during the onboarding process.	<ul style="list-style-type: none"> <li>• Hold daily check-in meetings for first two weeks</li> <li>• Keep in touch with new hire via instant messaging</li> </ul>
Provide a peer mentor.	A peer mentor or “buddy” can answer common new hire questions and create a social connection for the new hire within the institution.	<ul style="list-style-type: none"> <li>• Set up a peer “buddy” who can answer common questions</li> <li>• Ensure new hire knows who they can connect with to get answers to specific questions</li> </ul>
Build a sense of team.	Team cohesion engages new and current employees and improves morale.	<ul style="list-style-type: none"> <li>• Hold a team meeting with ice breakers</li> <li>• Schedule team pull-ups to discuss priorities</li> </ul>
Set clear expectations.	Since remote staff often miss context and background information that on-site staff benefit from, it’s important to be clear in sharing performance expectations and work plans.	<ul style="list-style-type: none"> <li>• Share an onboarding plan for the first few weeks</li> <li>• Discuss communication expectations (frequency and channel)</li> </ul>
Share remote work resources.	To promote long-term success, supply remote new hires with institutional resources, necessary technology, and tools to support mental and physical health while working remotely.	<ul style="list-style-type: none"> <li>• Identify institutional resources for remote workers</li> <li>• Confirm that new hire has necessary technology and access to department files</li> </ul>

# Executive Summary (ctd.)

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## Six Critical Tools Managers Can Use to Improve Remote New Hire Onboarding

This guide equips managers with the six steps that will most efficiently and effectively onboard remote new hires. Collectively, these six tools will help managers ensure new hires feel welcomed on their first day, supported in their first week, and receive meaningful feedback about their performance across their first four months.

Many of the practices within the tools in this guide could be used for on-site new hires as well as remote ones. Practices particularly relevant for remote new hires are **bolded in blue** for easy reference.

Tool	Intended Use	Page
<b>Tool #1:</b> Manager Preparation Checklist for New Hire	List of activities to prepare manager to welcome new hire	7
<b>Tool #2:</b> Welcome Note Template	Sample language manager can use to reach out to new hire before start date	8
<b>Tool #3:</b> New Hire Welcome Folder Checklist	Inventory of materials for new hire to be included in a folder on the share drive	9
<b>Tool #4:</b> New Hire First Week Activities Checklist	List of potential activities for new hire's first week	10
<b>Tool #5:</b> Manager-New Hire Discussion Guide for First Check-In	Detailed questions to encourage meaningful discussion during manager-new hire check-in meetings at the end of first week of employment	11
<b>Tool #6:</b> Manager-New Hire Discussion Guide for 30/60/90/120-Day Check-Ins	Thoughtful questions to enable managers to assess new hire's acclimation to the role and institution	12

For ease of use, we have provided an editable version of every tool in this resource. Please visit our website at [eab.com/remote-onboarding](http://eab.com/remote-onboarding) to download these tools.

# Tool #1: Manager Preparation Checklist for New Hire

## Goal

This checklist contains the steps managers should take before each new hire's first day. Managers should review the list at least two weeks before new hire's start date to allow sufficient time to complete all the tasks.

**Coordinate with IT to mail a laptop or other equipment as soon as possible to ensure equipment arrives before the start date.**

## Estimated Time Required

1 hour total (spread over multiple activities)

## Related Tools

Tool #2: Welcome Note Template (page 8) and Tool #3: New Hire Welcome Folder Checklist (page 9)

## Available Online

To access an editable version of this checklist, please visit [eab.com/remote-onboarding](http://eab.com/remote-onboarding).

- Confirm new hire's start date with HR
- Alert IT Department/Operations of new hire's start date to arrange the following (if applicable):
  - Computer access: laptop pick-up or delivery (coordinate with IT as soon as possible if laptop is being mailed to remote worker)**
  - New hire institution ID/badge (if worker will occasionally visit campus)
  - Email account
  - Voicemail account
  - Assigned cube/office space (if worker will have one for occasional campus visits)
- Create virtual onboarding schedule** for first one to three weeks. Begin with the HR orientation schedule and proactively invite new hire to any additional meetings. Examples include:
  - Manager virtual lunch
  - Peer virtual lunch (a lunch with other employee(s) at the same level)
  - Check-ins with team members and people critical to their role
  - Online tutorials they should watch
  - Manager daily check-in. Frequent check-ins, especially in the first few weeks, ensure a remote new hire has the opportunity to ask questions and a manager can give needed guidance.**
- Email welcome note to new hire one to two weeks before start date (see Tool #2: Welcome Note Template)
- Assign staff mentor or peer "buddy"
- Add new hire to department organizational chart, telephone/email directory, and distribution lists
- Announce new hire's position and scheduled start date to department staff, either at staff meeting or via email
- Set up cell phone (if applicable)
- Set up travel account (if applicable)
- Prepare department welcome folder for first day (see Tool #3: New Hire Welcome Folder Checklist)
- Arrange for first day welcome gestures (e.g., schedule a virtual team meeting or virtual lunch)**

# Tool #2: Welcome Note Template

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## Goal

This tool includes a checklist of elements to include in a welcome note email, as well as a sample email. Managers should adopt this for their own use and email a welcome note to each new hire one to two weeks before their start date.

## Estimated Time Required

15 minutes.

## Additional Resources

New hire's email address.

## Available Online

To access an editable version of this checklist, please visit [eab.com/remote-onboarding](https://eab.com/remote-onboarding).

## Checklist for New Hire Welcome Note

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- Congratulate new hire and welcome them to the team
- Introduce yourself and explain that you will be their direct manager
- Ensure new hire understands instructions for the first day
- Provide an overview of the first week on the job (schedule, tasks, etc.)
- Link to or attach any pre-reading that would be helpful or get them excited
- Provide a contact for additional questions/issues that arise before start date

## Sample Email

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Dear Alison,

Hope you are doing well and getting excited to start at [INSTITUTION] on [DATE]. We are thrilled to have you on our team. I'm especially looking forward to being your direct manager and working closely with you. I have been at [INSTITUTION] since [DATE] and am passionate about what we do.

I'd like to give you a preview of what to expect during your first week.

- On your first day, plan to...
- During your first week, you will...

I'm also attaching [EXAMPLES OF RECENT PROJECTS, PRESENTATIONS, ETC.] for you to get a sense of some of the things we work on. Feel free to review now or during your first week!

**Do not hesitate to reach out to me or your HR representative if you have any issues getting your laptop and equipment,** or have any questions before your first day.

We are glad to have you onboard!

Best,

Leigh Ann Gardner



# Tool #3: New Hire Welcome Folder Checklist

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## Goal

This checklist contains items managers should include in an online folder that new hires receive access to on their first day. If you are assigning each new hire a peer buddy, consider putting the buddy in charge of creating the welcome folder and reviewing it with the new hire.

## Estimated Time Required

1 hour to collect materials for the initial folder, 10 minutes for each subsequent folder.

## Available Online:

To access an editable version of this checklist, please visit [eab.com/remote-onboarding](http://eab.com/remote-onboarding).

- Copy of job description
- Department mission and goals
- Department organizational chart and leadership bios
- List of current department projects and related materials and/or link to relevant folders on share drive
- Department staff work schedule (**including time zones**) and scheduling procedures
- Copy of employee handbook
- Resource page with links to resources for new employees, as well as context and resources important for remote employees to have.**  
Example links:
  - Benefits page
  - Campus calendar
  - Virtual tour
  - Institution's news and social media platforms
  - Training portal and/or links to online courses available to faculty and staff
  - IT homepage
  - Employee mental health resources
- Copy of or link to explanation of benefits and PTO policies
- Security and building access procedures with link to campus map (if employee will visit campus)
- Department phone, email, and directory (including new hire's contact information)
- Phone and email directory of primary contacts in other departments
- List of whom to contact for help with specific challenges

# Tool #4: New Hire First Week Activities Checklist

## Goal

This checklist contains the “must-do” steps to ensure new hires learn crucial information in their first week.

## Estimated Time Required

1 hour for each new hire, direct time spent by manager.

## Related Tools

Tool #5: Manager-New Hire Discussion Guide for First Check-In (page 11).

## Available Online

To access an editable version of this checklist, please visit [eab.com/remote-onboarding](http://eab.com/remote-onboarding).

- Complete manager-new hire meet-and-greet
  - Review job description and expectations
  - Review work schedule (**especially if new hire will have flexible hours or is in a different time zone**), time off and holidays, pay schedule and overtime policies (if applicable)
  - Share communication preferences regarding channels and frequency, including any communication technology used by the team (e.g., Slack, Teams)**
  - Ensure new hire has time scheduled with IT/Operations (if not done by HR) to set up the following:
    - Email
    - Voicemail
    - Network access
    - Relevant passwords
    - ID badge and keys (if employee will visit campus)
    - Ensure new hire has all technical equipment necessary for them to be successful; only 83% of new employees report having materials and equipment they need for remote work, compared to 87% of tenured employees**
  - Discuss performance management process (e.g., goals and performance scale)
- Follow initial meet-and-greet with daily check-ins during new hire’s first week.** Frequent check-ins, especially in the first few weeks, ensure a remote new hire has the opportunity to ask questions and a manager can give needed guidance.
- Introduce new hire to colleagues via a team video conference and/or individual video meetings**
- Direct new hire to required or relevant HR Orientation sessions, **materials, or recordings**
- Encourage or arrange social opportunities for new hire (e.g., team or peer virtual lunch)**
- Introduce new hire to peer “buddy” as a resource to navigate the department and institution**
- Complete first manager-new hire check-in at the end of the week (see Tool #5: Manager-New Hire Discussion Guide for First Check-In)

Source: Community Memorial Hospital, Menomonee Falls, WI; Northwestern University, Evanston, IL; Overlake Hospital Medical Center, Bellevue, WA; Renown Rehabilitation Hospital, Reno, NV; Vanderbilt Medical Center, Nashville, TN; “[Onboarding for Remote Employees](#),” Quantum Workplace; EAB interviews and analysis.

# Tool #5: Manager-New Hire Discussion Guide for First Check-In

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## Goal

This discussion guide equips managers to jump-start more meaningful conversations with new hires. Managers should hold the check-in conversation at the end of the new hire's first week.

## Estimated Time Required

20 to 30 minutes.

## Available Online

To access an editable version of this guide, please visit [eab.com/remote-onboarding](http://eab.com/remote-onboarding).

1. Which team members have you met this week?
  - a. Have you spoken to [teammates] and [peer buddy]?
2. What have our team members done to make you feel welcome?
3. If you had questions, was someone always available to answer them?
  - a. Who has helped you the most?
4. What was the best part of your first week? What activity did you find most interesting?
  - a. Why did you enjoy that experience?
5. What was the most challenging thing you had to deal with this week?
  - a. How could we have made that challenge easier to manage?
6. Is there anything that you think we should change to help new staff during their first week on the job?
  - a. Can you tell me more about why we should make that change?
7. Is there anything we haven't explained fully?
- 8. Have you been able to access everything you've need to? Are there any technology issues I can help with?**

# Tool #6: Manager-New Hire Discussion for 30/60/90/120-Day Check-Ins

## Goal

This discussion guide equips managers to gauge how a new hire is adjusting and surface any potential retention concerns. Managers should meet with each new hire after the first 30, 60, 90, and 120 days of employment and ask these questions. If the new hire's responses signal that they may be a retention risk, managers should consider meeting with the new hire more frequently to monitor their progress and intent to stay.

**Since over half of remote employee turnover occurs between 100-120 days into their tenure, managers should ensure to flag and address any concerns especially during the 60- and 90-day check-ins. The 120-day check-in is an additional meeting recommended for remote employees, to make certain a manager is maintaining frequent communication.**

## Estimated Time Required

30 minutes per discussion.

## Available Online

To access an editable version of this guide, please visit [eab.com/remote-onboarding](http://eab.com/remote-onboarding).

## Discussion Questions

## Signals of Possible Retention Risk

### Baseline Expectations

- |  |  |
|--|--|
| <ol style="list-style-type: none"> <li>1. Has this job met your expectations? In what ways? Where has it fallen short?</li> <li>2. Do you have the tools and equipment you need to do your job?</li> </ol> | <ul style="list-style-type: none"> <li>• Answer to primary question is no or ambivalent</li> <li>• Expectations about work conditions unrealistic</li> </ul> |
|--|--|

### Acculturation

- |   |   |
|---|---|
| <ol style="list-style-type: none"> <li>3. Which coworkers have been especially helpful to you?</li> <li>4. From what sources have you obtained information about news in the department and the institution?</li> <li>5. Tell me about some of your successes during your first [30/60/90/120 days].</li> </ol> | <ul style="list-style-type: none"> <li>• Unable to provide examples of helpful colleagues or personal successes</li> <li>• Information sources listed are unreliable</li> </ul> |
|---|---|

### Challenges

- |   |   |
|---|---|
| <ol style="list-style-type: none"> <li>6. Describe any frustrations you've experienced so far.</li> <li>7. Have you done anything to address these frustrations?</li> </ol> | <ul style="list-style-type: none"> <li>• High number of frustrations</li> <li>• Has not tried to resolve problems</li> <li>• Blames others for problems</li> <li>• Is bothered by typical conditions of department</li> </ul> |
|---|---|

### Suggested Onboarding Improvements

- |   |   |
|---|---|
| <ol style="list-style-type: none"> <li>8. In what areas would more training be helpful for you and other new hires?</li> <li>9. If you could change one aspect of your experience in the department, what would it be?</li> <li>10. On which aspects of your job performance would you like more feedback?</li> </ol> | <ul style="list-style-type: none"> <li>• Uninterested in personal feedback/development</li> <li>• No desire to help department improve</li> </ul> |
|---|---|

### Overall Concerns

- |   |  |
|---|--|
| <ol style="list-style-type: none"> <li>11. Do you have any concerns about your job that I could address?</li> </ol> | <ul style="list-style-type: none"> <li>• High number of concerns</li> <li>• Does not share any concerns but appears dissatisfied or anxious</li> </ul> |
|---|--|

Source: EAB interviews and analysis.



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