

# Remote Onboarding Checklist

## Pre-boarding

- Share completed contract or employment agreements once all parties have signed
- Send a welcome email with the start date, employee handbook, and first day instructions
- Ship necessary equipment (such as a laptop, mouse, keyboard, and monitor) to the worker's home
- Set up a company email account
- Provide access to onboarding software and other required technology systems
- Ask each new team member to complete initial digital onboarding paperwork before the first day
- Begin scheduling onboarding and introductory meetings for the first week

## First day

- Allow time for each new worker to log in and get settled on their first day
- Conduct a virtual orientation session, preferably with other workers who are starting on the same day
- Complete remaining virtual onboarding paperwork and account setup and confirm all technology is working

- Share access to team documents and resources
- Assign onboarding mentors or buddies to support new team members throughout onboarding
- Ask each new team member's manager to host a check-in at the end of the day to go over the role, responsibilities, initial goals, and questions

## First week

- Conduct any additional general and role-specific orientation sessions throughout the first week
- Assign self-guided learning modules or assessments, such as security and compliance training
- Schedule a virtual meeting for the new worker to meet the rest of their immediate team
- Add the new worker to recurring team meetings
- Set up individual introductory meetings between the new worker and any relevant team members
- Share initial assignments for the new team member to get acclimated to their role
- Host a wrap-up meeting between each new worker and their manager at the end of the week to answer questions and review goals

## First month

- Schedule weekly one-on-ones between the new team member and their manager

- Develop a 30/60/90 day plan for each new worker and use SMART goals to track progress
- Gradually increase job responsibilities and projects as initial orientation sessions wrap up
- Provide opportunities for team collaboration and cross-departmental projects
- Host a remote team building activity to drive worker engagement
- Collect onboarding process feedback
- Meet with each new worker at the end of the month to check on progress toward goals, share feedback, and answer questions
- Schedule performance reviews aligning with your next review cycle
- Identify ongoing talent development opportunities and resources for each new worker's first year