



9-STEP REMOTE ONBOARDING CHECKLIST

Follow the checklist below for successful remote onboarding.

IN ADVANCE OF DAY 1

1. Documentation

Send out all necessary documents including contracts, manuals and handbooks, HR paperwork, pension enrolment forms, organisational chart, legal forms etc.

2. Logistics

Arrange delivery of required workstation furniture, necessary stationery, ergonomic aids and welcome gift (including company branded merchandise).

3. Technology

Delivery and installation of technology e.g. hardware, laptop, printer, headset, and phone and ensure adequate connectivity.

4. Formalities

Set up and provide first day and first week agendas, software downloads and accounts, log-ins, passwords, passes, licenses and calendar access.

ON DAY 1

5. HR practicalities

Remote HR induction e.g. leave arrangements, benefits, hours and overtime, health & safety, company culture, values and compliance. Showcase product/service.

6. Team integration

Arrange video call introductions, team meetings, inter-departmental intros. Put in place mentoring/buddy relationship. Conduct remote 'tour' of the organisation. Socialisation.

7. Management

Arrange line management video call to establish workflows, responsibilities, expectations, workflows and first tasks. Establish reporting line and relationship.

WEEK 1 ONWARDS

8. Training

Identify and provide required training in role-specific tasks, compliance, communication tools and other company specific requirements.

9. Feedback

Organise and provide regular and ongoing new-starter feedback through scheduled check-ins in line with goals/objectives and feed through to development opportunities.