People Sirius

Remote Worker Onboarding Process

There are a number of elements to consider when onboarding new employees, however there is a greater level of preparation required to do this successfully for remote workers. The first 120 days of employment with a new company will set the level of engagement for the duration of their employment, with little to no fluctuation. In order to set a high level of engagement for remote workers, Sirius People has put together a detailed onboarding process that covers important milestones along the way. We will also be offering our expertise and platforms to our clients free of charge to support them through this evolving situation.

Please note: This Process is assuming you have already made your hire and contracts have been signed. We also have a detailed process for online interviewing, selection and offer management.

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The Process

STAGE: **PRE-START DATE (Post-Contract Execution)**

❏ STEP ONE - The Warm Welcome

Delivery: Physical Items required to be delivered by Post
Key Personnel: Hiring Manager, Office Administrator
Provide new hires with your company swag. Help your new hires feel like a part of the team by sending them a ***welcome/induction pack***. You can include:

- Branded merchandise, like a coffee mug or T-shirt;
- A welcome letter, email or handwritten card from their team or even better, your CEO
  – See our free new employee ***welcome email template***;
- Provide a copy of their first week schedule;
- Personalised gifts they're likely to enjoy (like headphones, a book or gift cards from local or online stores).

❏ STEP TWO - The "What to Expect" Email

Delivery: Email
Key Personnel: Hiring Manager
Send your new hire an email that outlines what they should expect on their first Day. It is always a little nerve racking to start a new job especially when you add a layer of complexity like remote working. So, why not remove this by sending your new hire an email that clearly outlines what they should expect on their first day and what documents/information they will need to have prepared. Check out the Sirius template in this document.

❏ STEP THREE - The Tech Setup

Delivery: Email
Key Personnel: IT Manager
Send new hires IT hardware and manuals. Order computers and other hardware remote workers need well ahead of their start date. Confirm they have received all necessary

equipment for their work and ask your *IT department to help them with their setup*, if necessary. Make sure new remote workers have the following to get started:

- Laptop;
- Mouse;
- Keyboard.

STAGE: **FIRST DAY**

❏ STEP FOUR - The Company Induction Meeting

Delivery: Video Conference Meeting
Key Personnel: Hiring Manager (or more Senior Manager)
Start the day with a 30-minute meeting covering the important parts of your business. Put together (if you haven't already) a brief presentation on your company vision, mission, values, cultural framework, organisational chart, introduction of of management team, introduction of key contacts, a brief history of the company, the benefits of working for your company and anything else that may be a soft introduction into the business. Follow up with the next step.

❏ STEP FIVE - The "Company Culture" Introduction

Delivery: Email
Key Personnel: Hiring Manager (CC HR / People Manager)
Get them up to speed on your company culture. Remote employees are part of your culture, despite not being in the office. To help them understand the culture, share:

- ❏ Your employee handbook in digital format;
- ❏ Any presentations, links or documents on your company values;
- ❏ Pictures and videos of some team events (an Instagram page demonstrating your company culture would be ideal, check out *Sirius People's*, for example).

❑ STEP SIX – The "HR & WHS" Paperwork

Delivery: Email
Key Personnel: HR / People Manager (CC New Employee's Manager)
Help new remote employees complete HR and WHS paperwork. Having your new hires sign New Hire forms and other legal documents can be time-consuming if they need to print, scan and email all copies or send them via mail. Consider using an e-signature tool, like *Signrequest* or *Echosign*, so that employees can add their signatures digitally and share documents with you in a secure environment.

❑ STEP SEVEN – The "Communication Tools" Available

Delivery: Video Conference
Key Personnel: Hiring Manager
Ensure new hires understand how to use your communication tools. Describe the best ways to contact team members and how to troubleshoot communication technology. Also, if relevant, provide manuals on how to install:

- Group messaging tool
- Video conference software
- Webphone application

STAGE: **FIRST WEEK**

❑ STEP EIGHT– The "Goals & Expectations" Meeting

Delivery: Video Conference
Key Personnel: Hiring Manager
Meeting with hiring managers to set specific goals & expectations and go through the schedule of regular/standard company meetings. Remote workers should not wait until their manager is online to learn what their next tasks are. Make sure hiring managers:

- Develop and share a task calendar after the new hire's training and onboarding sessions;
- Define short-term and long-term goals;
- Schedule weekly one-on-one meetings to discuss upcoming projects, progress and resolve potential issues;

- Go through standard/regular company meetings (ie - End of Month Presentations, End of Quarter Presentations... etc.

❑ **STEP NINE – The "Meet the Team" Meetings**

Delivery: Video Conference
Key Personnel: All Direct Team Members & Key Employees
Set up meetings with their team members and other key employees. These meetings could be one-on-one and/or group calls. During their first week, remote employees should meet with:

- Their coworkers,
- Their manager and direct reports
- Employees from other departments they'll work closely with.

❑ **STEP TEN - The "Training Schedule" Meeting**

Delivery: Online Video Conference
Key Personnel: HR and Hiring Manager
Meeting to discuss and arrange role-specific training. It's often challenging to *train remote employees*, as real-time communication is usually limited. To effectively train remote workers:

- Use interactive training courses that are user-friendly and include games and quizzes to boost engagement;
- Record product demos to better explain features through video;
- Follow up after each training session to answer questions.

❑ **STEP ELEVEN – The "IT Guru" Meeting**

Delivery: Video Conference
Key Personnel: IT Manager / Worker
Arrange a training session with your IT department. Remote workers should get familiar with:
- File-sharing applications and cloud backup software (like Google Drive, Dropbox, Carbonite),
- Computer security (for example, how to lock laptops and install anti-virus software), and
- Password management and data encryption tools to protect their devices.

STAGE: **SECOND WEEK AND BEYOND**

❏ **STEP TWELVE - The "Performance Review" Chats**

Delivery: Email / Followed up with Calendar Invitations
Key Personnel: Hiring Manager
Schedule calls and performance reviews after their first week, month and quarter to touch base. These calls will help you understand if they're facing any difficulties and whether they've settled into their roles. We recommend the following schedule:

- End of first week
- Beginning of second week
- End of second week
- Beginning of third week
- End of third week
- Beginning of fourth week
- End of fourth week
- Beginning of twelfth week
- 6 month probation review

❏ **STEP THIRTEEN - The "In-Person" Meeting**

Delivery: In-Person Meeting
Key Personnel: Hiring Manager
When possible, arrange an in-person meeting so that they can get to know coworkers in person. If you have distributed teams and all employee work from home normally, make sure to schedule quarterly or annual events or retreats, where entire teams get the chance to meet. If this is not possible due to COVID-19, have lunch delivered to your employees and put together a team lunch over a video conferencing system, such as Zoom.

❏ **STEP FOURTEEN - "The "Sign Off" Document**

Delivery: Email
Key Personnel: All Key Onboarding Experience Personnel
Have all key inductors sign off on all processes as completed for the new starter. This is to ensure that every remote worker is exposed to the same experience and creates a consistent

message for all new employees. The checklist will expose any gaps that need to be addressed immediately.

Quick access to important documents:

The Checklists & Templates

- ❏ Company policies checklist for new hires
- ❏ Internal promotion announcement email
- ❏ IT onboarding checklist
- ❏ New employee announcement email
- ❏ New employee introduction email to clients
- ❏ New employee orientation program checklist
- ❏ New employee welcome email
- ❏ New employee welcome package
- ❏ New employee welcome letter (HR) sample template
- ❏ New hire checklist template: Before the first day
- ❏ New hire first day checklist
- ❏ New hire paperwork checklist
- ❏ New hire training checklist
- ❏ New hire welcome letter (supervisor)
- ❏ Onboarding internship checklist
- ❏ Onboarding new managers checklist
- ❏ Remote employees onboarding checklist
- ❏ Welcome to the team email

Further to this document, there are a number of online tools that can help you set up a remote team. You can find a list of useful tools at the bottom of this document.

Remote Worker Welcome Pack

Introduction Paperwork

New hires should know all about your company and your people to help them feel as though they are a part of the team. You will want to give them as much information as possible so here is what to include in the Remote Worker Welcome pack by post.

A print copy of your *employee handbook* (digital copy is OK but not as powerful)

1. HR forms, like:
   - Employment Contract
   - Benefits /Employee Value Proposition documents
   - Emergency Contact form
   - Confidentiality and Company IP agreements
   - Company Policies acknowledgement
   - Calendar for new hire's first day and first week at work
   - **Work from Home Safety Checklist** and access to WorkPro interactive module

2. Organisational chart

3. Office map

4. An employee directory, including each employee's:
   - Phone number
   - Email
   - Username on company's group messaging app

5. A guide with local hotspots, including nearby:
   - Cafes
   - Restaurants
   - Gyms

Useful Materials and Tools

Send new employees practical items that they'll use on a daily basis. Also, think proactively and gather resources that will help them complete their first tasks. These items could be:

1. Branded IT hardware, including:

    - Laptop
    - Monitor
    - Mouse
    - Keyboard
    - USB stick

2. Branded Stationery, including:

    - Pens/Pencils
    - Post-it notes
    - Notebook

Personalised Items

Bring out the big guns to put your best foot forward and offer thoughtful personalised items. These items can speak volumes of your culture and show that you are excited for your new employee's arrival. Here are some suggestions on what to offer:

1. Welcome card signed by all members of the team
2. Branded merchandise, like:

    - Water bottle
    - Keep Cup
    - T-shirt or jumper

3. Name plate
4. Business cards
5. Welcome gift. This can be relevant to the new hire's team's culture, or something that might be useful. Here are some ideas:

    - Books that are endorsed by the business (perhaps have their manager write inside the book for a personal touch)
    - Headphones
    - Coffee gift cards

New Remote Worker Welcome Email Template

Email subject line: Welcome to [Company name]

Dear [Employee's name],

We are all really excited to welcome you to our team! As agreed, your start date is [date]. To kick-start your first day we will be meeting via video conference at [time] and our dress code is [casual/ business casual]. The invite to your very first video conference will be in your calendar and all you need to do is click the link to join.

[If necessary, remind your employee that they need to bring their ID/ paperwork].

At [Company name], we care about giving our employees everything they need to perform their best. Our team will help you setup your software programs and online accounts on your first day. [If applicable, mention any extra gifts you've prepared for your new hire, like a keep cup with their name or a company t-shirt].

We've planned your first few days to help you settle in properly. You can find more details in the enclosed agenda. As you will see, you'll have plenty of time to read and complete your employment paperwork (our People team will be there to help you during this process)! You will also meet with your hiring manager to discuss your first steps. For your first week, we have also planned a few training sessions to give you a better understanding of our company and operations.

If you have any questions prior to your arrival, please feel free to email or call me and I'll be more than happy to help you.

We are looking forward to working with you and seeing you achieve great things!

Best regards,

[Your name]
[Your signature]

First Day Email Template (send two business days before start date!)

Hey [Candidate Name],

I hope you are having a fabulous day!

We are all really excited to welcome you to our team this week!
Your start date is [Day], [Date] at [Time] and our dress code is [business attire].

At [Your Company], we care about giving our employees everything they need to perform at their best. Our team will help you set up your computer, software and online accounts on your first day.

Some tips and tricks to ensure your first day goes smoothly…

- Please ensure you have: 100 points of ID (document attached), TFN Number & Superannuation Details (details required attached), details of your Emergency Contact.
- Our dress code is [business attire]

We've planned your first few days to help you settle in properly. During Day 1 we will give you a full introduction to Sirius People as well as introduce you to everyone within the [Insert Location] team by video.

You will have plenty of time to read and complete your employment paperwork on Day 1 (our People team will be there to help you during this process)!

For your first week, we have also planned a few training sessions to give you a better understanding of our company systems.

Again, we are thrilled to have you joining our Team and look forward to working with you and seeing you achieve great things here!

Please call me if you have any questions at all.

See you soon,
[Insert Hiring Manager Name]

New Remote Worker IT Setup Checklist

Pre-Start Date

1. Coordinate with the hiring manager and HR/People team to obtain the key information in order to set up and test all systems, including the following:

   - Name /Contact details
   - Job title
   - Division/Department
   - Start date
   - Software and/or Systems

2. Order hardware/equipment new hires will need, including:

   - Laptop (and stand if necessary)
   - Monitor
   - Mouse
   - Keyboard
   - Cables
   - Phone / Mobile

3. Determine what systems, software, tools and permissions your new hires need. This can include:

   - Company email Video Conferencing platforms, login details and instructions for use
   - Group messaging tool
   - Database
   - Analytics/reporting platforms
   - Spreadsheets

4. Get approval from the senior management team to set up new accounts.

5. Invite the new hire to join corporate accounts and send them setup guidelines.

6. If applicable, contact new hires or their hiring managers to learn their preferred tech equipment.

First Day

1. Provide digital copies of manuals for hardware and software so that new employees can reference them when needed.

2. Ensure all new hires understand and sign internet usage and data privacy agreements.

3. Train new hires on how to secure their workstations. For example, make sure they know:

   - How to store digital files
   - How to share confidential/sensitive data
   - How and when to log off and lock their computer

4. Explain how new hires should reach you if they have any technical issues. Include your:

   - Email and phone
   - Username, if you communicate via an group messaging platform
   - Cover off your company procedure to request technical support

Post-First Week

1. Check in with new hires to see if they've properly installed all software.

2. If necessary, schedule trainings on:

   - Security policies
   - Best practices when using company equipment/software
   - Productivity tips

3. Answer specific questions new hires may have after using tools.

4. Have the new starter sign off on all systems/software training (if any not signed off, schedule further training sessions).

Post First Week

1. Answer specific questions new hires may have after using tools.

2. Revisit systems/software training sign off and complete sign off.

New Remote Worker Training Considerations

Before your new hire's first day

Send some useful resources in advance to save you time on training and help new hires come to their new job prepared. Here are some things to get done before your new hires start:

- Send an agenda for the first day, so they know what to expect (include any one-to-ones, demos or training relevant to your new hire's role).
- Send manuals and instructions on how to set up corporate accounts (e.g. company email).
- Send a digital or print copy of your employee handbook, so new hires can take a look and prepare any questions they may have.

On your new employee's first day

Company overview training

Use this overview to explain how your departments are structured. You can present this overview to groups, if there are multiple new employees starting on the same day. To facilitate discussion, make sure each group is small (no more than three or four employees.), so each member is able to ask questions easily in the video conference

Here's what to include in a company overview training:

- Present your company history and mission statement;
- Display your company timeline with key achievements;
- Provide a copy of your organizational chart and indicate where the new hire sits within the chart;
- Offer detailed explanations of department structures and roles;
- Provide any product demos the new employee might need;
- Set aside time for the new hire to ask questions;

Company policies training

During your company policies video presentation, highlight the most important things new employees need to know and address their questions.
Here's what to include in a training on company policies:

- Describe your workplace rules (e.g. hours, breaks, use of lockers and key fob);
- Describe the types of leave the new hire is eligible for (sick, vacation, etc.) and when the new hire can begin going on leave;
- Explain your requirements for remote work;

- Explain your performance review process;
- Ask new hires to review and sign any non-disclosure or confidentiality agreements;
- Provide an FAQ document on the most popular company policies.

Benefits package training

Insurance and equity plans can be difficult to understand. During this training, explain your benefits in simple terms. Clarify any actions employees need to take to use their benefits packages. Answer questions they have. If necessary, get signed copies of contracts.
Here's how to conduct a training on employee benefits:

- Present all options for life and health insurance plans and make sure new hires acknowledge the terms;
- Explain equity plans and provide documents that describe the terms in detail;
- Explain flexible hours options and requirements
- Describe how to use all available training and development benefits, like education budgets;
- Describe any mobile plan and/or company car reimbursement benefits you offer;
- Present the details of your wellness programs or health perks (e.g. discount gym membership).

Role-specific training

In this training, hiring managers explain team structure and roles, establish expectations for success and set new hires up with useful tools and resources.

Here's what hiring managers should include in role-specific trainings:

- Describe the new hire's tasks (e.g. a typical day at work);
- Present job-specific tools that the new hire will use;
- Provide a list of helpful resources to find answers to FAQ's;
- Display and explain reports that track the team's KPIs;
- Present business objectives related to the new hire's position and team;
- Explain the roles of different members on the team and how the new hire will work with them;
- Schedule regular one-on-ones with the new hire;
- Schedule introductory one-on-ones between the new hire and team members.

IT setup and training

IT staff should help new employees set up their computer stations and ensure all systems are up and running. They should also guide new hires on data privacy, system security and proper use of software and hardware.

Here's what to include in an IT setup training:

- Make sure new hires have access to necessary tools and manuals to use hardware and software;
- Check whether new hires have set up company accounts (e.g. email) and provide assistance where needed;
- Ensure all new hires understand and sign data privacy agreements;
- Help new hires configure WLAN connection settings (computer and mobile);
- Help employees install anti-virus software;
- Set new hires up with password security accounts (e.g. LastPass.);
- Describe the visitors policy;
- Train new hires on how to secure their workstations.

A week after your new hire starts

Safety training

Typically, your office manager or HR team member would officiate workplace safety training sessions within the first three months of your employees' hire. When necessary, collaborate with professionals on relevant topics (e.g. inviting First Aid Trainers as instructors). In our current COVID-19 circumstance, please train new hires on the following safety practices once they are allowed to return the office.

Here's how to train new hires on safety practices:

- Organise an emergency evacuation drill;
- Schedule a First Aid presentation;
- Provide guidelines on proper use of hazardous material and equipment;
- Run a fire drill and describe precautionary actions to avoid fire risks;
- Explain all measures the company enforces to protect employees' wellbeing (e.g. non-smoking policies);
- Provide office ergonomics tips, including:

    o Good desk posture
    o Proper chair height
    o Adjusting monitor brightness

A month after your new hire starts

Security training

During this training, a member of your IT or Security team should describe employees' data privacy and system security obligations. For roles where employees handle confidential employee or customer data, prioritise security training earlier than one month. Otherwise, schedule this training to be completed during the new hire's first month at work.

Here's what to include in a security training for new hires:

- Present security training videos and test employees' knowledge of security protocols (e.g quizzes, role-playing);
- Enable features that let employees remotely access corporate software;
- Go over out-of-office best practices (e.g. how to securely connect to local networks and how to join video calls);
- Review workstation security measures;
- Invite employees to join a security forum on your company intranet so they can ask questions (e.g. Slack #security channel, BambooHR).

Helpful Online Tools to Manage a Remote Workforce

Zoom

Any remote team worth their salt needs a dependable way to video conference. For all our huge technological innovations, it's been surprisingly hard to enjoy seamless video conferencing so far, but with Zoom it's that bit easier. We've found it to be much more light-weight than Skype; quicker to set up, quicker to run and quicker to just get everyone on a call.

As you'd hope, it's really easy to invite people to calls and share your screen, making Zoom ideal for meetings, demos and presentations. Because you can have up to 500 video participants (and 10,000 viewers!) at one time, it's perfect if you're a large company whose staff is working remotely.

Slack

Billed as a virtual office, Slack is pretty much integral to remote success. One of the biggest issues remote teams face is poor communication, but Slack solves many of these problems. Its clean interface means that setting up group conversations and individual video calls is quick and easy, so if you feel your remote team might benefit from some one-on-one chat and authentic eye contact, it's only a few clicks away.

Sharing files and documents is also a breeze. There are clear paths for project communication, and if your team's spread around the world, you won't miss updates that occurred whilst you were sleeping. It will help you gain full company visibility of what's going on, and quickly catching up on context when you're pulled into helping something unfamiliar.

Basecamp

Basecamp is another all-rounder, and this project management tool is particularly valuable for remote teams who work alongside external clients. Basecamp is about helping everyone get on the same page, but it's also a handy place to archive documents and keep all HR info (e.g. team member bios, holiday calendar, employee guide, company announcements, company results, etc.) in one accessible place. This multipurpose tool also excels at:

To-do lists:
- It's easy to draw up to-do lists for your different projects;
- allocate tasks, and set dates;
- Basecamp automatically follows up on late tasks for you, too, and you can add notes and attachments and comment on tasks and lists;

- Message boards: Trawling through emails or a series of disjointed comments will be a thing of the past, as Basecamp is smart enough to keep all relevant conversations together;
- You can embed photos or files into your comments, customize your post types, and share with as many or as few people as you want;
- Scheduling: Every project features a schedule that highlights all significant dates for that job, keeping you on track;
- You can subscribe with either Google Calendar or Outlook, add events with dates and times (and notify attendees if that changes), and discuss upcoming events on the respective pages.

Dropbox

When the team is working remotely, you need to have a practical place to share and store files. The cloud-based Dropbox is great for this. Dropbox is incredibly simple to use: just drag and drop large files and docs, and play around with the settings.

Check out the useful "Paper" feature, too, which makes it easy for your team to share, edit and comment on documents from one place.

Timely

When you need to coordinate workloads, priorities and resources among your remote workers, it really helps that the product you're building does exactly that. It will come as no surprise to learn that we use Timely to automatically track our hours and provide visibility over what we're all doing. It helps project managers coordinate team resources and ensure everyone has a manageable workload – busting your weekly capacity or doing overtime becomes immediately apparent.

Since so many remote workers use travel time to work, Timely's GPS tracking features make it easier than ever to capture all the hidden details spent on the job; everything is saved in real-time, and having such a revealing record of your day is enormously helpful when it comes to improving your own efficiency.

The insights gleaned from individual time tracking data also make it simpler to manage and structure work too, which is important for remote workers. With no clear boundaries between work and personal space, and no one structuring your time for remote employees, good time management is imperative for sustaining and enjoying a remote lifestyle.

Zeplin

It doesn't matter what your company does – decent design is something every business needs to nail. With that in mind, there's Zeplin; a neat tool that enhances communication

between designers and developers, making it painless to share and collaborate on design systems and app interfaces.

Zeplin helps you stay organised, saves everyone time (meetings are cut in half!), and keeps everyone on the same page, no matter where they are. All team members can retrieve the newest design resources, add comments, and export designs in one click. The whole interface is easy to read, so even those unfamiliar with design know how to find and feedback on the information they need.

Coda

Think of Coda as a beautiful amalgamation of Basecamp and Dropbox. It merges the flexibility of a doc with all the organization and complexity of a spreadsheet, allowing you to effortlessly collaborate and neatly structure HR, project strategy and company documents.

Because you don't have to constantly flick between different documents, apps or spreadsheets, your ideas can flow spontaneously and develop organically. Coda's versatility means that it'll likely become a regular addition to most remote teams, where people require access to shared data, but also need to view and use said data individually.

1Password

You'll never have to worry about remembering passwords again – and you'll certainly never have to take precarious steps like emailing passwords out to your entire team. 1Password gives you company-wide access to accounts and tools, remembering your passwords for you and storing them away safely until they're needed.

As the name would suggest, you only need one company password to let everybody access account login details for all the tools you use. You can onboard new employees and quickly check out a summary of permissions, so it's a great tool if you're hiring new remote people and want to ensure smooth induction and equal access.