

- *A successful onboarding plan ensures that new employees feel welcome and connected to the organization and helps in setting clear expectations and boundaries. Research shows that a positive onboarding experience leads to employee retention.*
- *In addition to the basics, new hires will need to become accustomed with team culture*
- *In a remote environment, the foundations are the same; you just need to get creative with your delivery*
- *Focus on having consistent **rules, rituals and protocols** that team members (new and existing) will follow*
- *Effective onboarding foundations:*
 1. **Define expectations**
 2. **Support with resources and technology**
 3. **Commit to thoughtful and consistent communication**
 4. **Create opportunities for connection**
 5. **Provide feedback and ask for feedback**

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Introduce them to your workplace culture:

1. **Introduce them to the team:** On their first day, introduce your new hire to the rest of the team and any individuals that they may work with frequently. Connecting everyone on the team through a virtual meet and greet creates an informal time to make introductions. If applicable, virtual meet and greets should also be scheduled with internal and external stakeholder groups they will be working with. Consider scheduling breaks in between virtual chats to allow the new employee to reflect and take notes as it can be challenging (and overwhelming!) learning a lot of new information.
2. **Set Expectations:** Give your new team members a break down of exactly what their onboarding process is going to look like. What meetings will they have each day? Who will they be meeting with? What is the purpose of each call? Schedule the meetings for them in their calendar. This can help them stay focused and reduce the stress of feeling like they might miss something.

3. **Onboarding buddy:** Assign an onboarding buddy for the first few weeks. This person can help with questions as they arise and help new members become familiar with processes. The university is a large and complex place and having a buddy helps new employees learn the ropes!
4. **Schedule daily one-on-one meetings:** Plan to meet one-on-one with your new hire to discuss their responsibilities and to answer questions. It is important to regularly check in around role clarity, successes and challenges. Using videoconferencing (rather than phone calls or emails) for these check-ins can also help you notice any non-verbal cues and get to know the employee face to face. Be deliberate about building in time and permissions to connect on a personal level to discuss stories and interests/hobbies – just like if you were in-person.
5. **Get to know your employee:** Consider giving the new hire a strengths-finder or personality assessment. This will allow you to understand your new hire's personality traits as leaders aren't able to directly observe how their new employees engage with tasks. The Owner's Manual Exercise is a great tool for employees to specify their unique and individual work style and share with team members.
6. **Create opportunities for connection:** Create formal and informal opportunities for team members to connect with each other. In addition to project and work-related meetings, look for ways to celebrate and socialize remotely. Schedule time for remote team building activities to boost collaboration and engagement. Applications such as Microsoft Teams can be used to create discussion groups, forums and channels.
7. **Get feedback on the virtual onboarding process:** Ask the new hire for feedback on their onboarding experience. This can help them feel supported, and help you improve your virtual onboarding procedures for the future.

Tips for a successful onboarding:

1. Consider creating an **FAQs document** that is unique to your team – chances are that questions you had when you first started are likely to be asked by future team members.
2. Make onboarding **materials clear, concise and easily accessible**. Process documentation should also be clear as these materials will be foundational for learning.
3. Set **onboarding goals and expectations** such as a checklist with goals for the first week, month and 90 days.
4. Make sure your new hire attends the [New Employee Welcome Orientation](#) to become acquainted with UCalgary strategy and culture and connect with other new employees.
5. **Probationary period and review (if applicable):** In addition to the initial onboarding, this is a great time to continue to plan for your new hire's success and to review the employee's performance during their probationary period. We recommend scheduling your mid-probationary and probationary reviews early to ensure the time is held in your calendar.

Resources for successful virtual onboarding:

- [Guidelines for working from home – Manager’s checklist](#)
- [Leading remote teams at UCalgary - Quick Reference guide](#)
- [Leading at a Distance – 36 min course](#)
- [Managing People: How to Manage Remote Direct Reports \(Article\)](#)
- [How to Collaborate Effectively If Your Team Is Remote \(Article\)](#)
- [Onboarding checklist for remote employees](#)
- [Onboarding new employees during the coronavirus](#)

LinkedIn Learning resources:

Great employee engagement requires great onboarding. Extend your onboarding knowledge with this [1-hour LinkedIn Learning course](#) for managers. Don't have account? [Get your free access here.](#)

- [Managing Virtual Teams \(56 min course\)](#)
- [Leading Virtual Meetings \(32 min course\)](#)
- [Ways You Can Give Your Remote Workforce a Sense of Togetherness \(Article\)](#)
- [Your Presence on Video Conference Calls \(34 min course\)](#)
- [8 Steps to Creating a Virtual Employee Onboarding Program \(Article\)](#)

Additional resources on working and managing remotely:

Guidelines, support and skill building for working remotely are available on the Faculty & Staff Support During the COVID-19 Pandemic Website. Access on-demand learning [resources](#) for:

- Working from home basics
- Managing People and Teams Remotely
- Health and Wellness
- Technology and Cyber Security
- Ergonomics at Home
- Meeting, Collaborating and Connecting