

Remote Onboarding checklist

First name

Last name






Company


Department

Position

Start date





After signing the contract

Task	Details	Status
Set up an employment record	Send a copy of the signed employment contract to HR and work with HR to set up an employment record.	Select option 
Develop a welcome pack	Prepare documents that contain relevant information about company benefits and company policies, including remote work policies.	Select option 
Send a welcome email	Send an email to the new employee to welcome him/her at your company and to mention he/she can expect an email with more information before the start date.	Select option 
Inform the team	<p>Inform the team about their new colleague, mention:</p> <ul style="list-style-type: none"> ✓ Job title and department ✓ Key responsibilities ✓ Background ✓ Start date 	Select option 
Set up IT	<p>Work with IT to make sure the new employee has all the necessary equipment and tools to work from home effectively (if applicable):</p> <ul style="list-style-type: none"> ✓ Laptop/tablet ✓ VPN connection or cloud-based virtual desktop ✓ Email address ✓ Logins to required internal and/or external systems ✓ Communication tools (Skype for Business/Zoom) 	Select option 

Task	Details	Status
Appoint a virtual mentor	Appoint a virtual mentor to provide guidance and advice to the employee to aid their understanding of the role and to help him/her find greater job satisfaction.	Select option 








Add comments

7 days before start date

Task	Details	Status
Develop a virtual induction plan	<p>Set up the necessary (video) calls for the employee's first week (or even two weeks).</p> <p>(Video) calls to set up (if applicable):</p> <ul style="list-style-type: none"> ✓ An introduction meeting with the team ✓ A meeting with the colleagues he/she will be working most with ✓ A meeting with his/her virtual mentor ✓ A meeting with HR ✓ A meeting with staff development ✓ A meeting with other key internal/external stakeholders 	Select option 
Organise the necessary documents	Prepare tax or KiwiSaver forms as well as any employee handbooks or manuals.	Select option 
Forward recurrent meeting invitations	Include the new employee on all relevant, existing (video) calls moving forward.	Select option 
Send practical email to new employee	<p>Send an email to the new colleague, preparing him/her for the first working day, including:</p> <ul style="list-style-type: none"> ✓ Information to prepare a functioning work station ✓ The day and time he/she needs to be online at his/her remote work station ✓ Logins for relevant tools/systems ✓ More (practical) information about the first day ✓ Documents he/she needs to email/prepare ✓ Welcome message 	Select option 



Add comments

First day

Task	Details	Status
Check IT	Check if the new employee has access to all the necessary tools: (Include IT if necessary) <ul style="list-style-type: none">✓ Outlook✓ VPN connection or cloud-based virtual desktop✓ Internal and/or external systems✓ Communication tools (Skype for Business/Zoom)	Select option 
Introduce the team	Set up a video call with the team to introduce the new employee to his/her colleagues.	Select option 
Explain induction plan	Discuss the overarching timeline for the first month or 90 days, and share the specific online meetings and trainings he/she will face the coming weeks.	Select option 
Online onboarding meeting	Organise a first online onboarding meeting for the new employee to learn about your company's mission, values, organisational chart, key products and services, as well as the virtual induction plan for the coming weeks.	Select option 
Discuss duties and expectations	Take some time to talk in greater depth about the position, its responsibilities and expectations.	Select option 
Set up a (video) call with HR	Organise a virtual meeting with HR to finalise any paper work and to share more information about the company benefits and policies, including policies about working remotely.	Select option 
Send company welcome email	To help the employee feel welcome, include his/her name in existing company welcome emails or ask the Managing Director to send an email.	Select option 



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1 week after start date

Task	Details	Status
Have the employee learn from team members	Identify team members who work in the same or similar roles so the new employee can learn from peers by setting up regular (video) calls.	Select option 
Schedule regular online catch-ups	Give the new employee the opportunity to ask questions, share progress updates, air any concerns and receive feedback on their progress on a regular basis.	Select option 



Add comments

1 month after start date

Task	Details	Status
Set up a (video) call to discuss their experience	Discuss with the new employee their experiences within the company so far and evaluate how you can make his/her remote onboarding experience more effective.	Select option 
Schedule online training	Engage with your employee to discover where online training for new skills may be required. Book in relevant internal online training sessions and webinars (if applicable).	Select option 




Add comments

3 months after start date

Task	Details	Status
Set up a mid-probation review	Revisit goals and responsibilities, and evaluate assignments, tasks and projects on a (video) call.	Select option 
Set up a virtual meeting to discuss their experience	Discuss with the new employee their experiences within the company so far and evaluate how you can make their remote onboarding experience more effective.	Select option 

Add comments

6 months after start date

Task	Details	Status
Set up a probation/ performance review	Revisit goals and responsibilities and evaluate assignments, tasks and projects on a (video) call.	Select option 
Organise an onboarding survey	(If applicable) Send a survey to the new employee, asking questions about the quality of the remote onboarding program with the aim of further improving.	Select option 
Don't overlook recognition	Keep the employee motivated and engaged by celebrating success. It could be as simple as noting the new employee's achievements in a virtual team meeting.	Select option 

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