

The First 30-Days: A Virtual Onboarding Journey & Essentials Toolkit

Hybrid teams have highlighted the need for a structured approach to onboarding to maximize employee engagement. This map provides a journey, and essential activities and tools, to help new hires and their managers navigate the first 30 days.

PRE-BOARDING ACTIVITIES FOR THE HIRING MANAGER

Pre-boarding activities are meant to help managers think through how to help the new hire gain self-efficacy early in their time at your company, as well as create a thorough plan for the new hire.

Hold a planning session with the hiring manager and cover context, credibility, and connection

WORKSHEET
For the hiring manager to capture context, credibility, and connection

COACHING
For hiring manager to review their completed worksheets

Welcome the employee in a way that sets the tone for employee engagement

VIDEO
What to Expect with our Hybrid & Virtual Work Environment

Cover any HR administrative paperwork that is possible to complete ahead of start date

CHECKLIST
New Hire pre-boarding activities

Schedule 30-day onboarding meetings on the new hire's calendar

WEEK 1

Before the new hire learns the technical aspects of their job, it is important to build the context of the role, the organization and the business, while also beginning to integrate the new hire into the culture and giving them the basic support they need to be successful.

Set the tone for employee engagement

Focus on hybrid teams

Focus on employee belonging

Begin manager conversations and Build social connections

Focus on new hire acclimation and administration

LIVE VIRTUAL WORKSHOP
Establishing Virtual Presence and Credibility in a Hybrid and Remote Work Environment

VIDEO
How the Company Supports Remote Workers

JOB AID
Where to get help 24 hours a day

DISCUSSION
Introduction to the importance of diversity and inclusion

VIDEO
Diversity, Inclusion, and Belonging – What's the Difference, and What's Your Role?

JOB AID
A list of resources, affinity groups, and other opportunities to connect with different demographic and professional groups

LIVE VIRTUAL WORKSHOP
45-minutes virtual team introduction, over lunch or coffee, with a discussion focus on culture, including the importance of diversity, inclusion, and belonging

JOB AID
Organizational chart with names and contact information

SHADOWING
Formal observation and debrief of team members in their interactions with clients and completion of their work

CHECKLIST
Administrative Paperwork

COACHING
Computer set-up, access, training

RESOURCE
Job description for review

WEEK 2

This week, take connections to the next level explaining how stakeholder responsibilities overlap and interact with those of the new hire. Encourage listening and observation before action and decision making.

Meet your mentor/buds

Facilitate 1:1 meetings with stakeholders

Provide introduction to key departments

Conduct initial project orientation

Invite to team meetings

VIDEO
Making The Most of the Mentor Relationship

JOB AIDS
To assist the new hire in preparing and sustaining the relationship

JOB AIDS
Conversations starters to help new hires ease into new relationships

VIDEO OR LIVE VIRTUAL WORKSHOP
Department introductions

CHECKLIST
Details to highlight about yourself (my role, my expertise is in..., come to me for...)

VIDEOS
Overview of products, services, and client profiles

LIVE VIRTUAL WORKSHOP
Job specific training

WEEK 3

The focus of this week is to begin an in-depth exploration of projects, markets and job responsibilities, while continuing to build connections and credibility more broadly across the organization.

Develop hypotheses and find an independent path

WORKSHEET
Captures new hire observations about organization, culture, and perceived priorities

Deep dive into responsibilities

JOB AID
Annotated job aid; including daily, weekly, and ongoing responsibilities

CHECKLISTS
Project plans, tools, and quality assurance rubric

Meet the CEO/Senior Leadership

PROFILE
Company profile and LinkedIn overview of senior leadership to be reviewed prior to meeting

WEEK 4

The final week of scheduled onboarding moves into strategic alignment, creating momentum and building credibility. Through the process of setting achievable goals, you build the new hire's confidence and establish a greater degree of engagement. Continue any introductions that weren't scheduled in prior weeks.

Mutually develop vision and goals

Provide introduction to key departments

Gain clarity around supervisor's style and priorities

Conduct formal 30-day check-in

WORKSHEET
Capturing employee vision and mutually established goals

AGREEMENT
Description of short-term goal/project, including deadlines and quality measurements

JOB AID
Questions to ask about supervisor relationship, style, expectations and priorities

CONVERSATION CARD
For the employee to use to maximize structured check-in conversations

LIVE VIRTUAL WORKSHOP
Setting Goals

LIVE VIRTUAL WORKSHOP
Giving & Receiving Feedback

LIVE VIRTUAL WORKSHOP
Managing Multiple Priorities