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WHITE PAPER

VIRTUAL ONBOARDING

JULY 2020

SETTING UP YOUR EXECUTIVE HIRE FOR SUCCESS

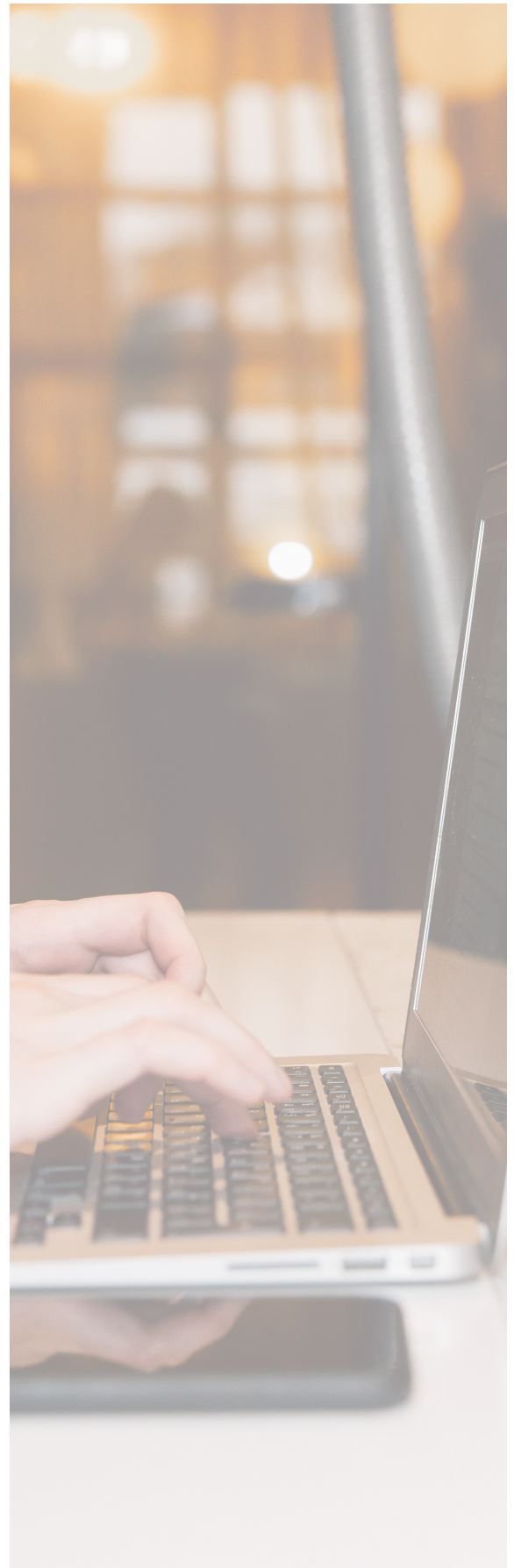
As we navigate the COVID-19 pandemic waters, we must determine how to best complete tasks virtually. One of the pressing demands is virtually onboarding executives, which can present its own set of unique challenges.

In most instances, there is no need to create a new process. The overall consensus is to implement the plan you have in place – but do so virtually. Below are some key takeaways we have gleaned from our human resources network and conversations with placements who have experienced the virtual onboarding process.

PRE-START ONBOARDING

The key to virtual onboarding is overcommunication. Double down on how you would normally communicate so the executive feels connected. This starts with a strong dialogue with your team members. It is also important to have an onboarding checklist so that everyone is clear on their role and no one misses a step.

Steph Dellari, Executive Director of Human Resources at Geron Corporation, recommends sending the executive hire an email that details their first day about a week or so prior to mailing the onboarding package. This email should include a schedule of onboarding meetings and photos of the employees and colleagues in those meetings, so the new executive can place names with faces.



The onboarding package should include:

The agenda previously sent via email, outlining the flow of the orientation and what they can expect from their onboarding experience.

A key contact list of who to call for different types of issues, such as human resources and IT, as well as a company directory or instructions on how to access this virtually.

A gift card for Grubhub, Postmates, DoorDash, or Venmo for lunch or happy hour meetings.

A safety package that includes sanitizer, a face cover, and gloves.

A copy of their calendar that outlines the specific onboarding meetings and sessions after the first day, with reference to any key executive meetings that are slated.

Self-study items so they can get up to speed with their department. This will help them feel more connected and will be a productive way to fill in any down time.

Company swag, which may include backpacks, water bottles, mugs, or t-shirts.

Any relevant confidential documentation that should not be shared over the internet.

A technology equipment package. This can be one of the most vexing parts of virtual onboarding, so make sure you have all the necessary equipment for them on day one. Talk with your new executive weeks prior to their start date to assess any additional technology equipment they will need in order to be successful. On their first day, schedule an “unpacking” call with IT to help them set up their workspace and avoid any confusion or frustration.

POST-START ONBOARDING

Onboarding during the best of times can be overwhelming, and doing so virtually can be even more daunting. Try splitting the onboarding over several days to make it more digestible. Be creative and make it fun.



Prepare a virtual tour of the office, so they know what it looks like when someone mentions the lab, conference room, or lunchroom.



Schedule video lunches, coffee chats, and happy hours in lieu of live meetings. Some examples are:

- One-on-one lunch with the executive hire and their manager
- A virtual lunch meeting with peers
- Lunch with their team
- Company happy hour or a townhall meeting
- Pairing with the Head of Human Resources, or a designate, to help with their orientation



Use tools to help orient new employees like Yammer and Slack, which allow employees to “congregate” and virtually interact with their fellow peers. You can even introduce your new hire via these types of platforms.

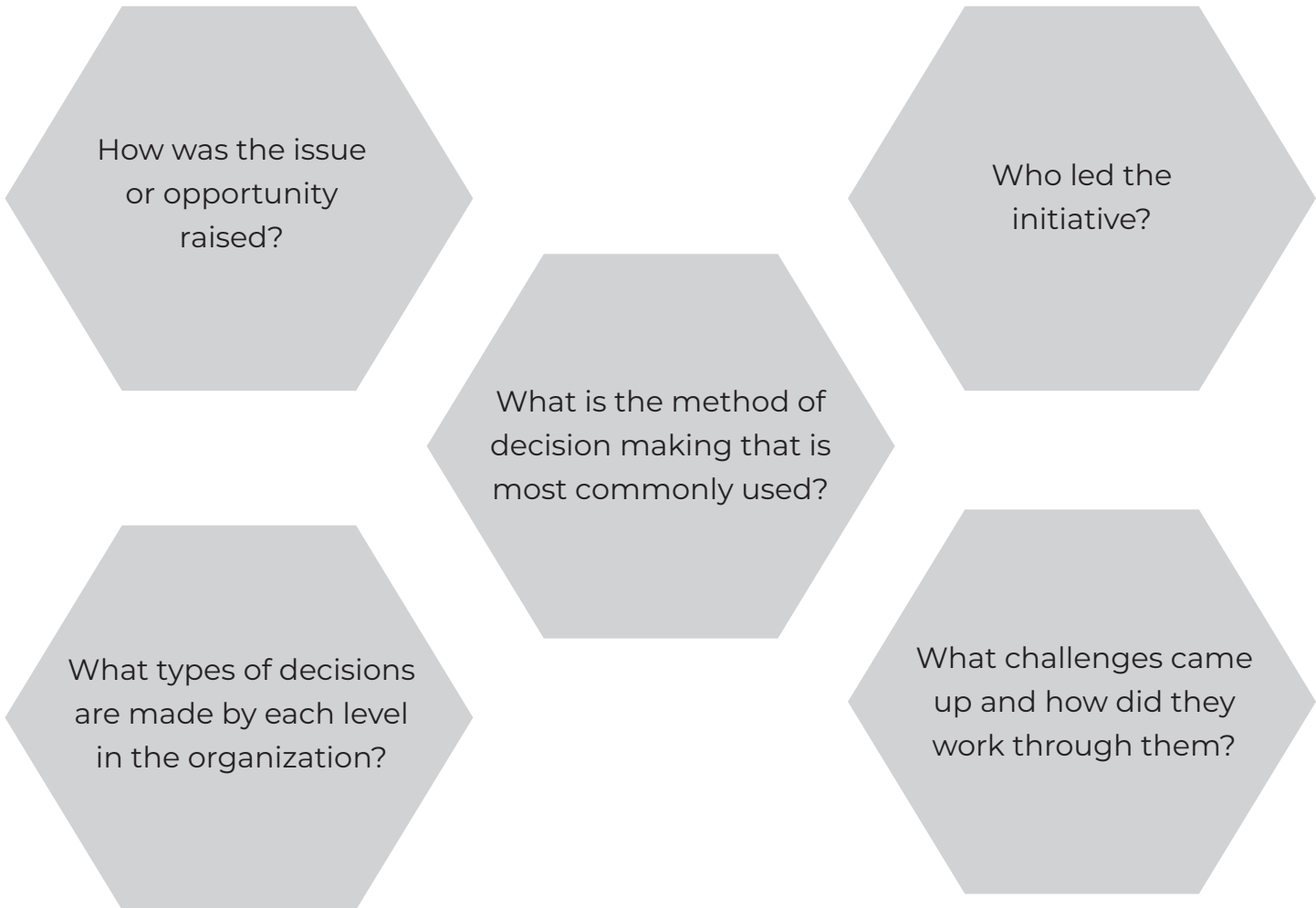
Remote work has created the need for purposeful inter-office engagement. Organic discussions that took place in person now need to be accommodated and scheduled. Be sure to schedule regular check-ins with your new executive outside of the usual business meetings during their first couple of months. Engagement is critical to a successful onboarding experience. Avoid discussing “the work”, but rather, focus on how they are integrating into the new role and what additional support they need.

Remember that organizations are complex and constantly evolving. Take time to help the new hire understand the organizational chart, and encourage them to talk with people to understand how things work in practice. This will allow them to identify the organization’s informal leaders – those who don’t have the title but have a great deal of influence – or legacy employees that serve as key sources of knowledge.



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Walk your executive hire through a project or recent decision. Dive into the following to help them better understand the decision-making process.



As the new hire integrates into their role and begins to fully understand the organization's Standards of Procedures and the design elements at play, they may want to dig deeper in some areas. Under normal circumstances, this may have happened spontaneously or only required a 15-minute visit to a specific division or department head. While working remotely, these "visits" will need to be purposeful and planned. Be sure both parties understand the query is for fact-finding purposes and to alleviate any potential future misunderstandings. In another instance, the new hire may want to sit in on a cross-functional team meeting to better understand the team interaction. Again, be sure everyone involved understands this is for information gathering purposes.

TIPS FOR YOUR NEW EXECUTIVE

Your new executive hire should prepare a plan that is closely aligned with the company's significant events, milestones, or occasions. Bearing in mind the rate of new information coming at your new hire, schedule some time to review and provide insight, guidance, and any additional information so they feel confident they are on the right track.

Gaylene Xanthopoulos, Founder + President of The Leadership Edge, recommends creating a 100-day plan for your new hire so they can hit the ground running. This plan for your new executive may include:



Have a virtual meeting with your manager. Identify what success looks like in your role.



Acquire a list of corporate and departmental goals to gain a sense of each department's role and responsibilities. Review the organizational chart to understand the general structure of the company.



Meet with them individually and listen. Understand their current roles, responsibilities, and expectations. Ask them what they believe are the opportunities and challenges for the company, department, and their role.



Share with them how you like to communicate, make decisions, and what your leadership philosophies are.



Be sure to demonstrate your values and the values of the company every day.



Identify how you can best add value to the team or organization.



Listen, observe, evaluate, gain input, and make changes if needed.

ADDITIONAL ONBOARDING TIPS

- When an executive hire is relocated, have the board and executive team produce a list of their favorite activities, restaurants, and places to go.
- Arrange for peers to call them, welcome them, and invite them to connect on LinkedIn.
- Organize a virtual lunch for the new hire with key individuals.
- Communicate, communicate, communicate. If you think you're over communicating, you're not.
- Zoom fatigue is real. Consider switching some meetings to phone calls if the relationship is established, and build in 30-minute breaks throughout the onboarding process. Avoid scheduling video meetings back-to-back, and, if possible, avoid full days of video meetings.
- Be patient and flexible. You are negotiating a new work reality for yourself, your team, and your company. Your new hire is aiming to do the same. They want to succeed and be a productive, engaged team member, but they may need more assurance as they progress.
- When it becomes possible, schedule your meetings in person, maintaining proper social distancing standards. A 30-minute check in over coffee in your backyard can go a long way to ensure engagement and a more personal connection.
- If your executive hire was placed by McDermott + Bull, call your Partner and have them check in. Sometimes candidates feel safer disclosing issues to a third party, and we are happy to help.

The success of your virtual onboarding process will depend on your structure, communication, patience, and empathy. If you build a bond and reinforce it by approaching everything with empathy and understanding, you are well on your way to showing your new executive hire just how happy you are that they have joined your team. In turn, you will have a more productive executive who is eager to achieve the results you are looking to accomplish.

ABOUT THE CO-AUTHOR



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ABOUT MCDERMOTT + BULL

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