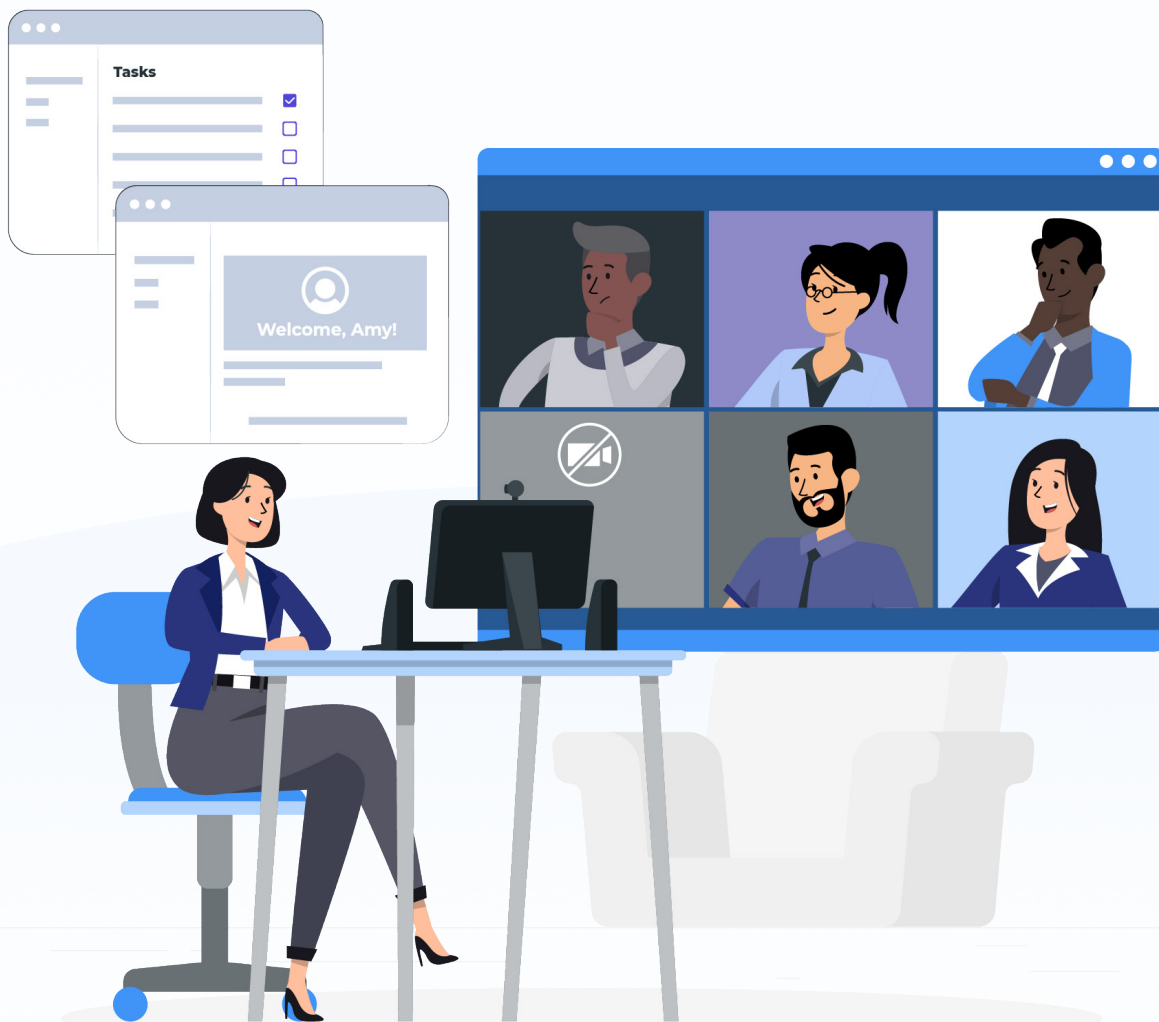




3 Simple Steps to Better Remote Onboarding

An actionable workbook with step-by-step
guidance for people teams



Why this workbook exists

Remote onboarding is a significant amount of work. What makes it hard? For starters, there are tons of moving parts and many things need to happen simultaneously across multiple departments. Meanwhile, people teams are operating under tight deadlines and various stakeholders need to be updated on progress.

Overworked HR, recruiting, IT, and people teams are sinking two or more days a week into manual processes. There never seems to be enough hours in the day to get everything done! And in many cases, a lack of process makes it hard to track progress, especially for teams using a long inter-departmental onboarding to-do list.

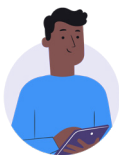
So can anything be done to improve the process, short of adding more people to the team or more hours to the day? Yes! This workbook will help you tackle your biggest remote onboarding pain points and put immediate solutions in place.

3 key areas of remote onboarding that need your attention:



Operational Tasks

New hire requirements: HR, tech, legal, and compliance to-dos.



Knowledge Sharing

New hire ramp-up: employee learns about the business and how to do their job.



Experiential

New hire integration: gets a feel for company culture and how things are done.

What you'll get

Build a realistic plan designed to immediately improve your remote onboarding.

In this workbook, you and your team will:

- 01** Define your remote onboarding process as it stands today.
- 02** Pinpoint what's not working today and prioritize your focus.
- 03** Set achievable goals for your three biggest areas of opportunity.

Participating in this exercise will help you inspire your team and achieve alignment, resulting in a more efficient, streamlined onboarding process.



WORKBOOK

Step 1 | Build an onboarding blueprint.

INSTRUCTIONS | The pre-populated text below provides an example of how you could fill out each section. Click on each box to type in your team's responses.

	Key Tasks (steps, tools, processes)		
	Operational	Knowledge Sharing	Experiential
 PREBOARDING 2 weeks before new hire starts	Key Tasks 		
 ONBOARDING New hire's first day	Key Tasks 		
 ONBOARDING New hire's first week	Key Tasks 		
 ONBOARDING New hire's first month	Key Tasks 		
 ONBOARDING New hire's second month	Key Tasks 		

The roadmap we just created will be a useful tool as we start evaluating your current remote onboarding process and look for opportunities to improve it. The Cleary team can help you further build out a comprehensive onboarding map.

Step 2 | Take an honest look.

Pinpoint what's not working with your current process.

Let's revisit that onboarding map you made on the prior page.

Now, it's time to do a thorough gap analysis by marking each step that presents some kind of challenge. This could be an inefficient tool or software limitation, communication challenge, manual process, or anything else you can think of that makes a particular step in the process difficult. As you identify your pain points, fill out the chart below.

In our next step, we'll choose the three most critical of these to create optimization goals for, so keep that in mind as you go through this exercise.

	Problem	Impact	Why It's Happening	Priority
 Example Pain Point	<i>We're tracking onboarding progress in a manual spreadsheet and it's messy and inefficient.</i>	<i>The current process is confusing for internal teams (HR, people, IT) and can result in slow progress for the new hire; doesn't make a great first impression.</i>	<i>We don't have a good internal tool or system that we can use to manage the onboarding process.</i>	☐ LOW ☐ MED ☒ HIGH <i>This affects multiple members of our team and is a huge time strain.</i>
 Pain Point 1				LOW MED HIGH
 Pain Point 2				LOW MED HIGH
 Pain Point 3				LOW MED HIGH
 Pain Point 4				LOW MED HIGH
 Pain Point 5				LOW MED HIGH

Great job! Now that we know what needs some work, we can put an action plan in place.

Step 3 | Take action.

Set achievable goals and immediately improve your onboarding process.

Now that you've clarified your priorities, it's time to choose three of the pain points that you ranked "high" from your list on the previous page to focus on. Then, we'll define an achievable immediate, 90-day, and ideal long-term goal for each.

As you think about your goals, be realistic. Consider small changes you can quickly implement to immediately reduce strain on your team. The idea here is to break things down into digestible pieces rather than trying to massively overhaul your entire onboarding program all at one time. Try to make sure the goals you put in place will scale over time. This will allow you to systematically reduce your team's challenges while optimizing your new hire's experience.

Let's start with an example to give you a good idea of how this might look.

WHAT needs to change:	New hires get a lot of emails and it can get be very confusing for them to prioritize tasks.	WHY prioritize this:	Putting a process in place will save time. A better process will also result in a better, more cohesive experience for the employee and will help us make a good first impression.
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Now, we can add this to the chart. For example:

	Immediate	90 day	Ideal Long-Term
 Example Priority and Goals New hires get a lot of emails and it can be very confusing for them to prioritize tasks.	<i>We're tracking onboarding progress in a manual spreadsheet and it's messy and inefficient.</i>	<i>Build one email template for each department for new hires.</i>	<i>Have a robust new hire onboarding content repository that can be customized for new hires.</i>
 Priority 1 Goals			
 Priority 2 Goals			
 Priority 3 Goals			

Excellent work!

Take onboarding from transactional to experiential

Cleary provides fast, easy, automated remote onboarding

A new hire's onboarding experience is critical to their long-term happiness, engagement, and - ultimately - their company loyalty.

In fact, the Harvard Business Review reports:

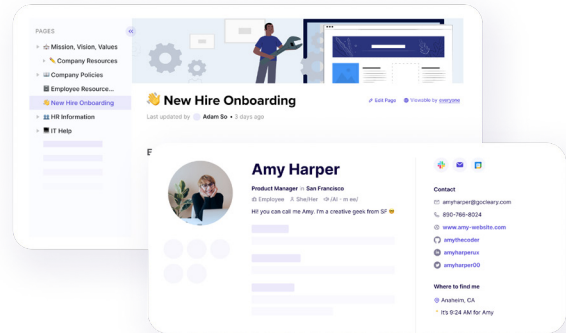
Almost 33% of new hires start looking for a new job within the first six months.

23% of employees leave before their one-year anniversary.

Nearly 90% of new hires decide whether they want to leave or stay within the first six months at a new job.

High turnover is a major issue. It hampers productivity and engagement - and the average recruiting cost to find a replacement can be as much as 20% of the job's base salary.

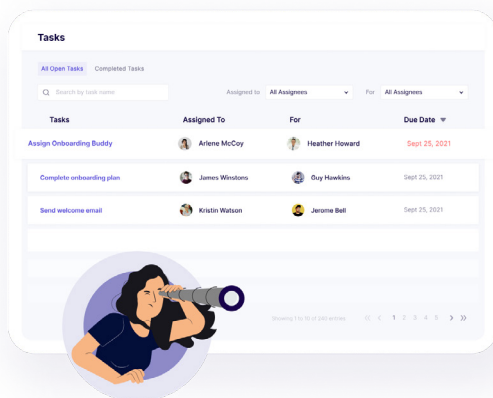
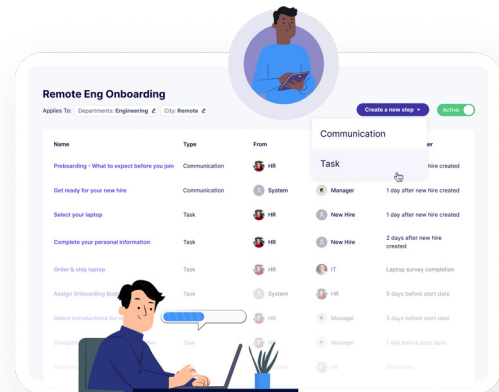
These findings illustrate how delicate the first six to twelve months can be for new hires – and how employee onboarding can be the difference between a turnover and top performer.



Cleary is your central command

Take complete control with templated journeys and tracking

Stop managing spreadsheets and separate systems. Schedule templated journeys with set-it-and-forget-it workflows that are automated, tracked, and personalized to each new hire.

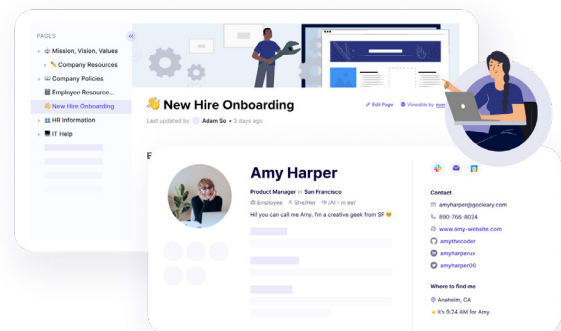


Shared view for managers and peers

Everyone is accountable and armed with a shared dashboard view and the prompts necessary for a coordinated new hire journey.

One single hub for easy access to company resources

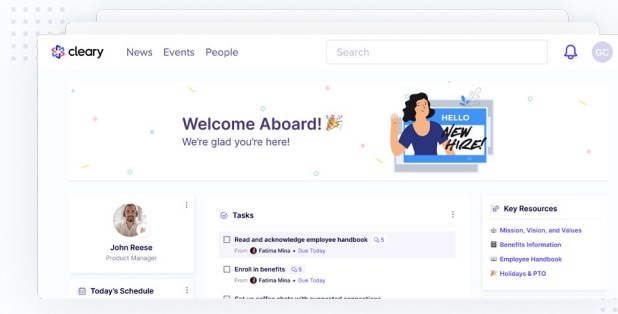
Don't let critical information get buried in Email, Slack or across platforms. Give employees a single hub to help them quickly access the resources they need.



Spark organic connections with colleagues

Add a 'culture vibe' to the remote environment. Help with onboarding buddy assignments, facilitate connections, and provide visibility to recognize their efforts.

Get out of the spreadsheet and into "Hello!"



People teams are often stuck in spreadsheets, manually tracking tasks.

New hires are confused and left to figure out where to go.

Managers and peers often don't know what to do next.

Automated communications and workflows help everyone spend less time tracking
and more time connecting.

Ready to give it a try?

Onboard your next hiring cohort for free! No credit card required.



www.gocleary.com

