



Remote Onboarding Checklist for Success

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|--------------------------------|--------------------|----------------------------|------------------------|
| ✓ TECHNOLOGY & EQUIPMENT READY | ✓ PERSONAL WELCOME | ✓ OFFICE BUDDY ASSIGNED | ✓ ONBOARD SCHEDULE SET |
| ✓ VIRTUAL WELCOME & TEAM INTRO | ✓ SET EXPECTATIONS | ✓ KEY MEETINGS ON CALENDAR | ✓ COMPANY CULTURE |

Make your new team member feel welcome

Have an email or note sent on day one with a welcome message.

Provide an org chart with pictures, roles and contact information.

Assign a buddy for the first few weeks to answer any miscellaneous questions.

Host a virtual team welcome for introductions.

Have technology and equipment ready on day one

Provide instructions on how to access key tools, email, servers, portals, files, assets and communication platforms.

Ensure secure access to systems.

Pre-load necessary programs and email signature on computer.

Share who to contact for technical needs.

Get started on the right foot

Provide them with an agenda and cheat sheet for the first week.

Schedule 1:1 meetings and training sessions with key team members and colleagues beyond the core team.

Pre-populate their calendar with meetings and recurring statuses.

Set expectations early on how to communicate, engage with team and start new role with success

Have a weekly check-in for questions, feedback and a deeper dive into role expectations. Establish a coaching plan.

Provide timely feedback and direction on initial projects.

Leverage all training tools such as webinars, Brand guidelines, samples and past project case studies.

Include them in as many applicable meetings and calls as possible to learn team terminology, client, work pace and workload.

Don't overlook company culture!

Developing company culture and colleague engagement are even more important when working remotely. Create opportunities for culture to thrive outside of the office and coworkers to interact socially.

Send new team member a goody box of company swag with logo, pens, pads, wearables, etc.

Consider sending cookies, flowers or balloons to their home office on their first day.