

*Beyond Technical:*

# *Virtual Onboarding for Power Transmission/ Motion Control Companies*





PT/MC companies have a mix of jobs, many of which like customer service, inside sales, accounting, IT, Human Resources and purchasing can be done remotely. This resource is designed to assist those working entirely remote or mostly remote (in office at least one day a week).

***NOTE:*** *This resource deals ONLY with virtual/remote onboarding. Any item can be adapted for face-to-face encounters.*

### **Why Onboard?**

A positive onboarding experience leads to improved job satisfaction and employee engagement. Onboarding provides the opportunity for new hires to adjust to a company's culture as well as learn their role in the organization. It cannot be a single welcome message, nor can it conclude after the first week of employment. As the new hire's tenure grows, there will be fewer touchpoints from their supervisor, however every interaction is meaningful.

It is suggested that a solid onboarding program include a schedule that is administered by a supervisor to assure the new hire is properly integrated into the organization. Additionally, with remote working here to stay, a virtual onboarding process should mirror the traditional face-to-face procedure.



## Changes to the Onboarding Process

The pandemic has forced organizations to pivot to new means to introduce employees into the workforce, making virtual onboarding a novel concept for many. Meetings and interactions that used to be conducted in-person now happen virtually for many Microsoft® Teams or Zoom meetings, emails, phone calls, text messages, Slack, etc. Keeping employees engaged and productive is not an easy task – especially in the virtual world.

A new hire requires nurturing and that means consistent contact with their supervisor, direction, updates about upcoming meetings/events, etc. If the position is completely remote it is suggested that there be many touchpoints – some via email, Teams and phone/text. Face-to-face encounters, where a manager sits down with a new employee and asks, “How are things going?” are no longer the norm, so scheduling “check-ins” with new employees is even more important so they feel welcomed, supported and that their contributions to the organization are valued.

Virtual onboarding is most successful when it follows a schedule that relays tasks/items to review with the new hire, indicates who is responsible, due dates and the format for meetings, e.g., email, video, phone call, Zoom, etc. Following is a suggested schedule which users can adapt to their specific needs.



Don't consider onboarding as a one-time event; done right it should continue during the first year of employment. Ensuring a new hire has a positive onboarding experience and feels engaged with their team and the company is the goal. The Society for Human Resource Management reports that 69 percent of employees that had a positive onboarding experience are more likely to stay with the company for three years. In a virtual world, interactions with coworkers don't allow much connection. Every manager or team leader plays an important part in helping immerse a new hire in the company culture and adapt to their role.

## First Interactions and Impressions

The new employee has accepted your offer. The offer letter contains information on start date, hours of work, salary information and how/when they are paid. IT information such as login credentials and arrangements for receiving and setting up a company laptop will be sent separately when employee accepts position. Make sure correspondence relating to these and other topics convey your enthusiasm for welcoming them aboard and your desire to help them become familiar with the company culture. Explain when and what additional information they can expect to receive from your organization.





## Inform Your Team of Their Arrival

Inform your team – if possible, during a meeting, but also via email - of the new hire: name, title, start date, welcome event, and any additional information needed. Make sure you include the new hire on the email.

Prior to the start date coordinate the following:

- Welcome email from department head
  - Welcome aboard letter/email from the CEO – sent on a different date
  - Schedule welcome event using Teams/ Zoom meeting
  - Assemble information on others in the department – name, title, what they do – OR you can ask each person in the department to send a welcome email with this information – even better, a short video
  - Assign the new hire a “buddy” – ideally someone in the department they can contact with any questions. Make sure the “buddy” contacts the new hire before their start date. In addition, the buddy is a valuable resource in helping the new hire assimilate to the company culture.
  - Be sure the new employee has the equipment they need for a successful beginning. IT should contact and advise what equipment will be provided and sent to them, and assist with set up of the equipment and signing into your network. Laptop and other IT equipment should be ready on their start date if not sooner.
- If your organization has branded merchandise (mugs, T-shirts, hats) send something to help the new hire start to feel like part of the team.
  - Send paperwork like benefits sign-up, payroll, tax information ahead of the new employee’s start date and have someone from Human Resources (HR) call to walk them through it (DocuSign is a great way to get their signature on forms). Provide contact information for HR and deadline for submitting the necessary paperwork. If there are additional mandated training courses, e.g., sexual harassment, offer direction on completing these.
  - Include the new hire on any ‘all employee’ and any departmental correspondence
  - Send recap of recent department meetings
  - Schedule meetings for the new hire with someone from every department in the company. These should take place during the first two weeks, so the new hire gets a better understanding of the organization. Put the day/time/person’s name and title/ department represented on new employee calendar.
  - Explain anything that may have been included in the offer letter, like a signing bonus. Compile a checklist so you cover everything necessary during the first two weeks of employment.



## Create an Agenda and Schedule for the First Week

It has been shown the first 90 days of employment is crucial to a new hire's success. Make sure there are enough touchpoints and time to reflect built into the schedule.

Consider these questions: *What do you want them to know by the end of their first week? How will you know if they are successful?*

Make sure the schedule for the new hire includes breaks to allow them to review and digest all they have learned. They may feel overwhelmed by the volume of information inundating them. Do not expect that they will remember everything.

## Suggested Schedule for First 30 Days

### Week One: Day 1

- Conduct a Zoom/Teams meeting with those in the department.
- Host a virtual lunch, making sure to have lunch delivered to your new hire before the meeting starts.
- Give a general introduction of the new hire to your department, then invite them to share additional information about themselves. Allow everyone in the department to follow suite, and include a question like, "What do you like to do when you are not working?" Make sure the question is not work related.



- Request that each member of your team schedule a time to talk and explain their role and how they will be involved with the duties of the new hire. These should be scheduled to take place by the end of week two, if possible.
- Provide a virtual list of all company employees, their department, email address and phone number.
- Encourage new hire to explore your website and social media sites.

***Remember: Virtual meetings can be exhausting. Give people down time and if possible, don't schedule more than three hours of meetings per day.***

### Day 2

- Schedule a time to talk with the new hire on Teams, Zoom etc. so you can both see each other as you discuss. Do they have any questions? Review the job description and explain what your expectations are and if there are any specific due dates.\*
- If there is any expectation of face-to-face meetings, advise of dates, meeting purpose and explain the rules – social distancing, masks, etc. that apply when in the office.

**Remember: the new hire will have meetings with department staff and someone in each company department, so don't schedule too much.**

***\*Daily check-in calls are suggested for the first two weeks and can become less frequent as the employee grows into their role. At a minimum, however, a regular weekly call should be scheduled.***



### **Day 3**

- Review the meetings you have set up with each department and provide the schedule along with contact information. If the new hire will be working closely with the department explain what is expected and with whom they will be working.
- Assign a small project to the new hire to complete by end of week two.
- Review (or have HR explain) when vacation/PTO starts being earned, when medical benefits begin, dental benefits, life insurance, etc.

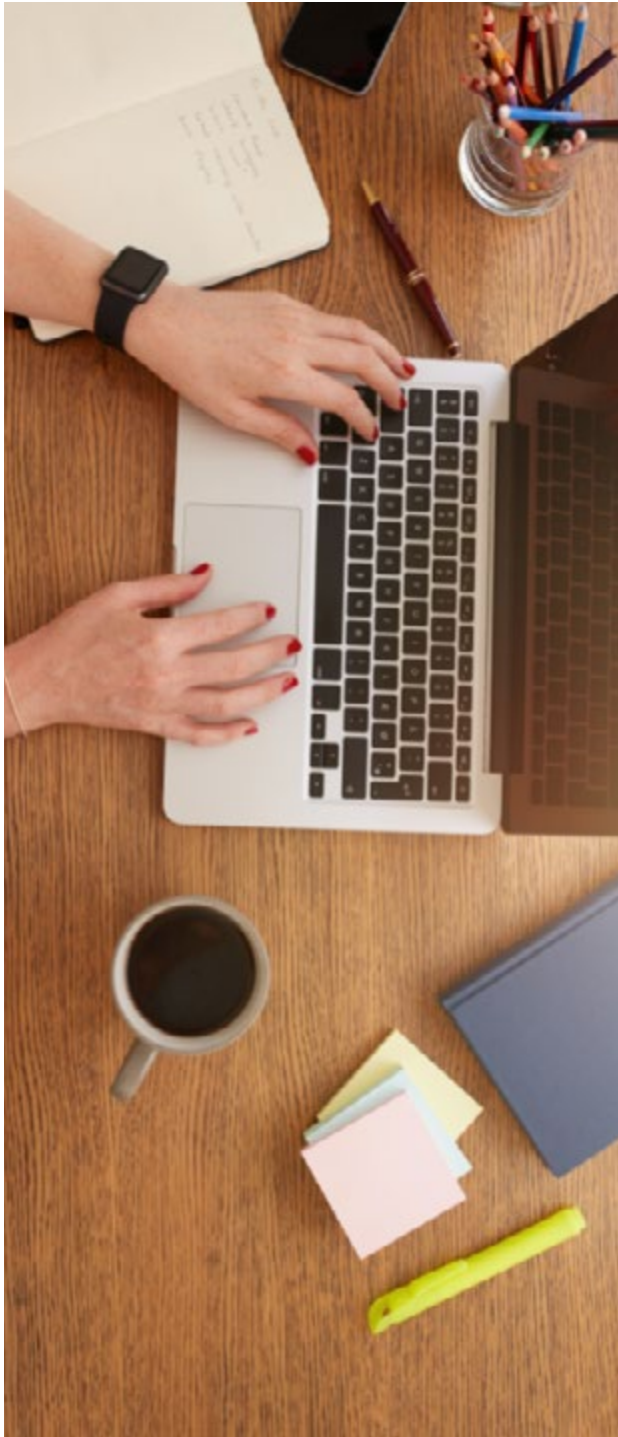
### **Day 4**

- By now, the new employee's head will be swimming with all the new things they are learning. Allow them this day to “learn on their own” -- review their position description, website, company mission, culture and values, organization chart, etc. and have them write down any questions so you can discuss on day five.
- Inform the hire that they can contact you or their “buddy” with anything they need clarified and you will review any questions with them, as needed.

### **Day 5**

- Congratulate the employee on how well they are acclimating to the culture, acknowledging that feeling overwhelmed by the copious amounts of information is common and expected. Offer encouragement, assuring them that they will learn everything they need to know gradually and should not be afraid to ask questions when they need more information.
- Review any questions they may have from their review of their position and the company.
- Does the new hire need any training on specific areas? Is there a skill they may not have but will need to do the job? If so, discuss how training will be done, when, with who (or online) and ask for their input.
- Although the new hire has been advised of their “buddy” and encouraged to reach out to this person for answers to company-wide questions, remind the “buddy” to touch base with new employee to make sure all is well.





## **Week Two**

- Reinforce the opportunity for 1:1 meetings to allow the new hire to ask any questions and give you the opportunity to digest information.
- Schedule group activities, like virtual cocktail parties or games, to allow the new hire to socialize with all.

**Schedule of what you expect the new hire to know in the first 30, 60 and 90 days and share this with them so they know what to expect.**

### **Day 1**

- Advise the new employee that you would like to set S.M.A.R.T. (Specific, Measurable, Achievable, Relevant and Time-based) goals for the first 30, 60 and 90 days. Ask them to think about these and let them know you will schedule a meeting on Friday (day 5) of this week to discuss. Be prepared to help them understand your expectations. These don't need to be lofty goals but do need to be achievable.

### **Days 2 through 5**

- Set up times to talk with new hire on Teams, Zoom etc. so you can both see each other as you discuss. Do they have any questions? Ask how their meetings with team members and personnel department are progressing? Review the goals for the 30 days and discuss possible future goals, for 60 and 90 days.
- Remember to encourage the new hire and talk about what they have accomplished. Give kudos where deserved. Ask them for feedback on the process.

## **Week Three**

***(This week will start the weekly check-in process with new hire.)***

- Set up a specific day/time for you and the new hire to meet via Teams/Zoom video and continuing weekly until you and the new hire are both comfortable. Then, transition to meeting every two weeks. Use this time to answer any questions the new hire may have and to talk about their tasks and projects.
- Give them a specific number of tasks to complete over the days and weeks ahead. If it has been determined that training is needed for a specific task, schedule this along with a follow-up with you.



### **Week Four**

- In addition to your weekly check in you should review the 30-day goals. (This can be done at the same time OR be two different times.) How are they tracking? Have they encountered any concerns? How will the employee go about meeting those that have not yet been attained?
- At this same time, you should go over the 60-day goals that will be due at the end of the employee's second month on board. Advise employee there will be a performance review at 90 days.
- Talk with the new hire about changing your weekly check in to bi-weekly. If they are comfortable with this, set up the new schedule.

### **Weeks Five Through Seven (start of month 2)**

- Continue with the determined check-in (weekly or bi-weekly). Ask if there are any questions about the 60-day goals and if so, how you can help in meeting them.

### **Week Eight**

- In addition to your agreed upon check in you should review the 60-day goals. (This can be done at the same time OR at two different times.) Have they been met, if not, what were the problems encountered? How will the employee go about meeting goals they have not yet attained?

- At this same time, you should go over the 90-day goals that will be due at the end of the employee's third month on board as well as the performance review.

### **Weeks Nine Through Eleven (start of month three)**

- Continue with the determined check-in (weekly or bi-weekly). Ask if there are any questions about the 90-day goals and if so, how you can help in meeting them. Ask them to begin thinking about goals for the rest of the year.
- Address questions regarding the performance review that will take place when the 90-day goals are discussed. Talk about what will be reviewed and ask the new hire to measure themselves in their performance.

### **Week Twelve**

- In addition to your agreed upon check in you should review the 90-day goals. Have they been met, if not, what were the problems encountered? How will the employee go about meeting those that have not yet been attained?
- Since there will also be a 90-day performance review you should schedule an additional meeting.







## Month Four

- Conduct a survey from an outside company to see how your new hire is feeling about their first three months on the job. How did things go? What could have been done differently? What did they enjoy about the process? Dislike about the process? What suggestions do they have to improve the process?
- Congratulate new hire on their first three months on the job. If possible, schedule a Teams/Zoom meeting with new hire and those who work closely with them for a virtual lunch.
- Work with the employee to develop goals for the next nine months. These should be in place by the end of the fourth month of employment.
- Assess how often they should be checking-in with you. Is there enough to discuss in a bi-weekly call or should the check in go to monthly? Schedule the next three check-in calls. Make sure the employee knows they can contact you whenever they need to and do not have to wait for the check-in call.
- After being on board for three months, is there a need for the employee to be trained in a new task? If yes, determine what type of training (online, face-to-face, virtual conference, etc.)

## Month Five

- Check-in with employee. Inquire as to how are things going?

## Month Six

- Find an informal mentor for the new hire. This person can assist in providing information about the business and more about the company itself. Informal mentoring is a relationship between two employees, where the mentor provides a listening ear and commentary on the issue being discussed by “someone who has been there.” The mentor acts as both a confidant as well as someone who can offer advice through experiential stories. ([See Mentoring Checklists](#)).
- Review goals for the year – are these still attainable? Do any need to be changed/ further developed?

## Months Seven to Eleven

- If there is no scheduled “check-in” established, touch base via email/text at least once a month to ask: How are you doing?



## Month Twelve

- Acknowledge the one-year anniversary of the employee among your team and in any company-wide newsletters, if applicable. Present the employee with an anniversary gift, e.g., tickets to a play, sporting event, day-off, gift certificate, etc.
- Review the goals and conduct a first-year performance evaluation. Discuss in what ways the employee is meeting or exceeding goals, where they require improvement and what they would like to do in the job. Give concrete examples. Encourage them to set goals for their professional development and discuss how you can support those goals. Are there classes, seminars, or other professional development opportunities you can recommend? What other opportunities are there for growth? Consider how you can help the employee meet their goals.

**Every organization will be different. In some cases, check-ins may be done by someone other than the new employee's supervisor. Adapt these guidelines to your organization so they are meaningful to you and your new employee.**

***Don't forget to check out other [PT WORK Force](#)<sup>®</sup> Resources on recruitment and retention on our website.***



**PT WORK Force®**

## About the *PTDA Foundation*

As the charitable arm of the Power Transmission Distributors Association, The PTDA Foundation champions education, outreach, and research initiatives relevant to the power transmission/ motion control (PT/MC) industry that enhance the knowledge, professionalism and productivity of industry stakeholders.

PT Work Force is a key initiative of the PTDA Foundation that is developing resources to help PT/MC companies attract, hire, on-board, train, manage and retain employees. The PT WORK Force can be reached at [ptda.org](http://ptda.org)

230 W Monroe St # 1410,  
Chicago, IL 60606-4703  
+312.516.2100  
[foundation@ptda.org](mailto:foundation@ptda.org)  
[www.ptda.org/foundation](http://www.ptda.org/foundation)