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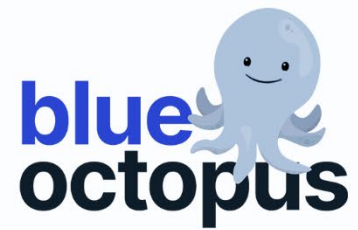
# The Virtual Onboarding Guide

Top Tips to Improve Employee  
Onboarding in a Virtual World

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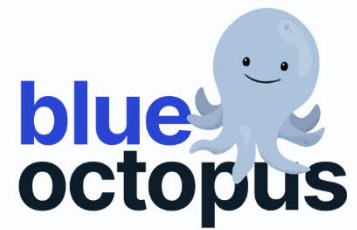
## Introduction: The Challenge of Onboarding New Employees During Lockdown

The onboarding process for new employees is, perhaps, the most important element of the recruitment cycle: the opportunity for recruits to find their feet in a new organization, to create meaningful working relationships with colleagues, and to begin to understand their role and responsibilities in the business. Up until last year, most of these processes happened in person, and it was hard to imagine that onboarding could be successfully conducted any other way.

Covid-19 changed this, however, and the global shift towards a blended business approach that combines remote working with on-premises operations creates a challenge for HR teams, who are faced with the problem of delivering effective onboarding at a time when many conventional business models no longer apply. How can the benefits of a good onboarding process – such as better staff retention, greater productivity, fewer mistakes, and better interpersonal relationships – be replicated using virtual tools in a remote working environment?

In this guide, we present our top tips for improving employee onboarding in a virtual world, whether remote working is a necessary evil for your business during lockdown, or a permanent adaptation.



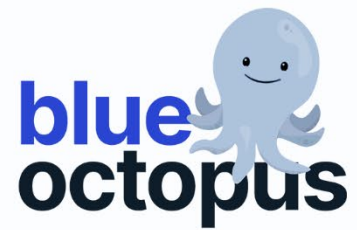


## Why Effective Onboarding Matters

Recruitment is a time-consuming and expensive process, so the last thing any employer needs is to lose a new employee prematurely. Poor technology, mediocre training, unclear expectations, isolation from their team, or non-existent feedback can all drive new recruits away, particularly in the first few months of their employment. For this reason, most 'white collar' employees spent the initial stages of their new role in the office, where they could integrate with the team and learn on the job – through formal training and informal interactions – from their supervisors and co-workers. Migrating to virtual onboarding is becoming an increasingly popular option, but it's essential to ensure employees aren't left feeling isolated or out of the loop. Therefore, an efficient, streamlined process offers considerable advantages over archaic manual systems, with the retention of top talent and lower HR costs key to any business' long-term success.

### Virtual onboarding: what can go wrong?

Inefficient employee onboarding can hinder the growth of a business, consuming time and money while failing to ease new recruits into their roles. A common misconception of onboarding is that it is simply a fixed-term induction process, often for no more than a week or two, after which all additional support is abruptly ceased – long before the employee feels comfortable in their new role. This isn't the case of course, as the formal induction process usually only scratches the surface of what is required during onboarding. Initial training and induction provide the new start with the core procedural framework on which to base a lengthier learning process – often over 3 to 24 months. This extended onboarding process involves regular reviews, training sessions, and mentoring arrangements, through which a new employee progressively builds the knowledge and skills he or she needs to fully adapt to their role. This deeply personal, face-to-face onboarding process is exceedingly difficult to replicate virtually without the right tools and structure in place.



Common problems with virtual onboarding therefore include:

**Information overload:** Many virtual onboarding systems make the mistake of providing all the information to the new employee at the start, before leaving them to work their way through it at their own pace. This is the equivalent of providing an undergraduate with a full year's teaching material (without tuition) in their first week at university. This approach fails because the human brain can't process too much information at the same time. It's easy for a new employee to feel submerged in data and not know where to start, particularly if the onboarding process overloads them with too much information or tasks before they find their feet, leading to feelings of inadequacy or inferiority.

**Unclear roles:** Job clarity is important for new employees who are stepping into unfamiliar territory. Even if they've read the job description carefully prior to applying for the post, starting a new role is always nerve-racking for new starters, and a lack of job clarity won't help to ease their anxieties. Being present in the office with colleagues gives new recruits first-hand experience of how the various job roles in your business interact in their areas of responsibility, and how the many different human personalities gel together (or not). Failing to recognise this may lead to duplication of tasks by multiple employees, unwitting insensitivity and poor relationship building, or new recruits 'stepping on the toes' of more established colleagues.

**Inefficient processes:** Manual virtual onboarding, involving the filling out of forms (often repetitively) and sending endless emails to the new employee, is often highly inefficient when conducted remotely, resulting in lost hours and the needless exchange of information to answer simple questions. In the office, these forms and procedures are simply a guide to the face-to-face induction process, but when used in isolation they lose their genuine meaning. More efficient virtual onboarding will streamline these processes for a specifically virtual environment, ensuring that communication between HR staff and employees is more relevant and focused.

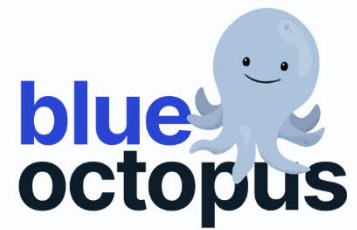
Common problems with virtual onboarding therefore include: (cont.)

**Onboarding that isn't role-specific:** Ideally, onboarding should be customised for each specific role in your organisation, recognising that every employee has unique responsibilities. While there may be some natural overlap between roles and departments, the onboarding process should be relevant and succinct, helping the employee to avoid a sense of being overburdened.

Overwhelming new employees could imply that they are expected to complete tasks outside their job description, damaging long-term retention, especially if mentors aren't directly present to answer questions as they arise. Virtual onboarding helps eliminate many of the known problems of manual processes, providing remote employees with a structured system of support that doesn't stop after their first week in post, instead offering a responsive approach to their induction until they feel settled in their new roles.





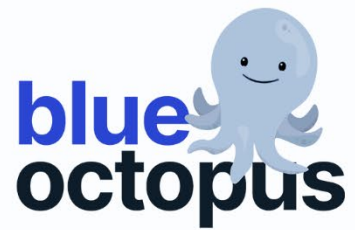


## How To Improve Your Business' Onboarding in A Virtual World

A seamless virtual onboarding experience helps ensure employees feel welcomed and reassured from the start – even before they technically join your payroll, or even step foot in your office. For companies who are structured to deliver face-to-face inductions and introductions, the move to virtual business poses more of a challenge, so some actionable steps can help to improve onboarding for remote employees who are new to your organisation:

### 1: Begin onboarding from the moment an offer is accepted

For some businesses, onboarding commences when a new employee arrives for their induction, despite the wealth of opportunities offered by the no-man's land that exists between the candidate's job acceptance and their first day. Once a job offer has been accepted and references verified, creating 'touchpoints' for the new employee will help forge positive relationships with managers, provide an opportunity for initial questions to be asked, and build confidence in both parties that the appointment will be successful: vital ingredients in a world in which new employees may be working remotely some or all the time. Sensitivity needs to be given to recruits who are working a notice period in another company, but there is still plenty of scope to ease recruits into their new employment gradually – avoiding a sudden influx of new information on Day One.



## 2: Empower employees to work autonomously

For businesses to operate effectively in the virtual world, it's more important than ever to invest trust in your employees, particularly new recruits of whom you have little knowledge. Remote working erodes traditional people management that occurs in an office, so there's a more acute need for trust between managers and employees. Trusting new staff to complete tasks independently – within a supportive framework in which feedback is provided and assistance is available – builds their confidence, while avoiding micromanagement gives them the autonomy to do their jobs effectively. To be effective, this approach must be balanced with a real-time monitoring and assessment mechanism that prevents new employees from accruing bad habits, or that allows mistakes to go unnoticed.

## 3: Implement a streamlined software solution

Onboarding software is purpose-built to improve engagement with new starters before they join your business, while streamlining and automating the HR tasks associated with administering onboarding. These platforms support businesses in delivering an engaging employee experience that maximises their involvement and commitment during the onboarding process, whilst promoting the organisation's ethos and culture.

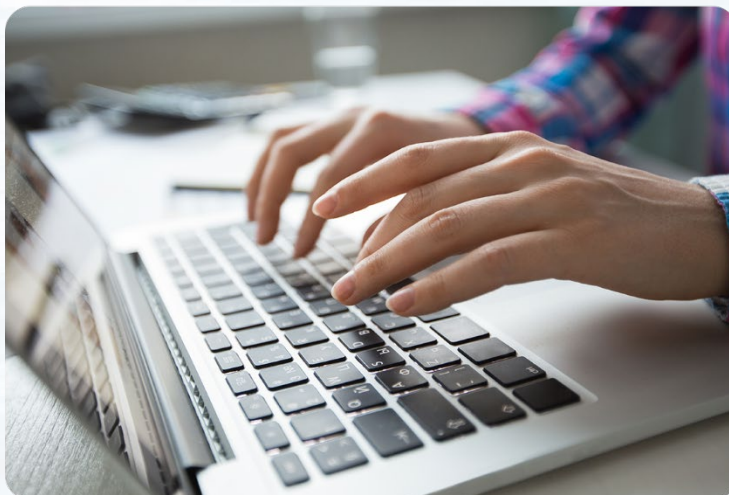
At Blue Octopus, our onboarding software integrates seamlessly with leading HR systems, eliminating or automating many of the most time-consuming tasks and providing effective ways for employers and new colleagues to engage constructively before and during their appointment. Our onboarding software can be adapted to meet the unique needs of your business whilst providing scalability as your organisation grows.

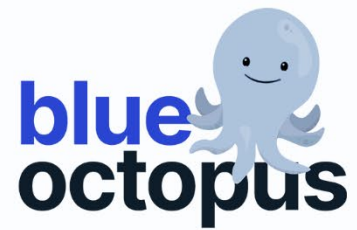


#### 4) Protecting organisational culture

Remote working will also make engaging new employees in your organisational culture more challenging, as it is harder to establish meaningful and respectful relationships, influence and evaluate team dynamics, and observe interactions across different departments. Ensuring each departmental manager promotes the ethos and culture of the business in all aspects of their team's work is crucial, as is creating opportunities for virtual interaction (such as Zoom socials, quizzes, and coffee mornings) outside of strictly work-based activities.

New employees may not feel confident about making connections and contributing to an established culture, so ensuring their voice is heard is important to engage them fully in your brand's mission.





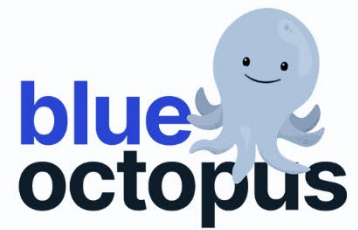
## How Virtual Onboarding Support from Blue Octopus Will Transform Your Business

Onboarding is such an important aspect of workforce management that getting it wrong can have lasting effects. An improvised, manual remote onboarding is more likely to be handled incorrectly or to lead to mistakes, giving new employees a negative impression of your business that discourages engagement and long-term loyalty. Excessive paperwork (or the electronic equivalent) can increase the time needed to induct new employees, affecting their productivity, and diluting their contribution.

By investing in tailor-made virtual onboarding solutions with Blue Octopus, your business can avoid the hazards of manual processes and enjoy the significant benefits of streamlined, automated onboarding – whether your new starts are home or office-based.

### Retain the top talent for your business

By improving the onboarding experience, you will benefit from keeping the most talented employees in your business. Improved employee engagement will boost their confidence in your brand, promoting it as a company that invests in its workforce and inspiring them to go over and above to deliver in their new role. Employees who enjoy a positive experience from the outset are more likely to remain with their company in the long-term.



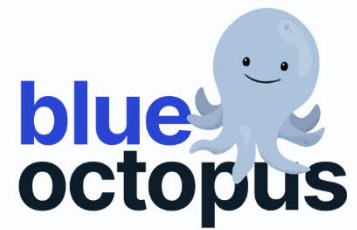
## Boost your business' reputation

Employee engagement is great for your business' reputation. Employees who feel welcomed during onboarding and settle quickly into their new roles are likely to speak positively about their experience, helping to cement your organisation's status as one that invests in its staff. A positive image encourages a higher calibre of candidates to apply for future vacancies, meaning you're more likely to secure the most talented workforce.

## Access the best talent wherever it is

Traditional recruitment is limited by the number of applicants within reasonable commuting distance of the company office, which disadvantages regional companies in favour of companies based in London and other large cities. In a virtual world, however, there are no geographical limits to obtaining the best people for your business, so you can base yourself away from expensive metropolitan areas without compromising your ability to source the best people for your role. Virtual recruitment and onboarding mean you can source applicants from a wider geographical pool, without the need for them to be personally present from the outset – a feature of recruitment that is likely to become even more important as businesses employ increasing numbers of home-based workers. With the right resources, collaboration platforms, and systems in place, you can cast your recruitment net even further, knowing that you'll capture the most suitable applicants, irrespective of where they are.





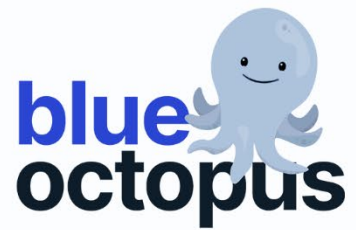
## Improve communication and slash time-heavy administration

Employee onboarding microsites can significantly reduce the amount of paper involved in the process, shortening the time between a successful interview and start day. With each new appointment comes a large volume of form-filling and data capture, so paperless onboarding via a single portal can avoid many of the delays that cause the most frustration for managers and employees – such as verifying references, personal identity, and qualifications. Digitised onboarding forms remove the need to scan, print, and manually enter employee information – good news for the significant number of people without a printer/scanner at home. A single onboarding dashboard improves visibility for all stakeholders, enabling employees and HR managers to view real-time processes through different levels of access. Integration with common HR processes, such as training, performance management, and employee self-service, ensures each recruit benefits from bespoke onboarding that meets their professional needs

With a single onboarding microsite, which contains all the information an employee needs with one login, your new staff can enjoy a simple, efficient, and user-friendly platform, saving your business time and money, and allowing your HR team to focus their attention on the matters that require direct input.

## Access the best talent wherever it is

Inducting new members of staff can be time-consuming, with whole days often being devoted to lengthy onboarding tasks that could be completed before an employee even arrives (or logs on) for their first day. An onboarding platform gives recruits early access to induction activities and initial training that can be completed at their own speed. Where this can be provided remotely, it slashes the time managers need to spend on administration such as sending and chasing printouts, supplying basic workplace information, and explaining how employees' first days in the business will be spent.



## Contact Blue Octopus to Overhaul Your Employee Onboarding Processes

Virtual onboarding eradicates much of the unnecessary and time-hungry manual processes of conventional onboarding, ensuring new employees enjoy a more focused, bespoke, and relevant induction process. With a single portal providing all the information and training new starters need to settle into your business, and the option of utilising multimedia to deliver training, feedback surveys, and other online content, virtual onboarding helps to retain the best colleagues, ensures top talent can integrate seamlessly into your organisation, and reinforce your brand's reputation as one that invests in its people. At Blue Octopus, we deliver effective software solutions to streamline your virtual onboarding system, helping you and your staff get the best out of each other.



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