Virtual Onboarding for Managers

Virtual Onboarding – Resources for Managers

This is a guideline for virtual onboarding and speaks to the current processes as of October 22, 2020

DESIRED OUTCOMES OF VIRTUAL ONBOARDING

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1. Onboarding fundamentals are completed
2. New hire is set up with all of the IT hardware and software required to execute their role
3. Create a virtual environment that encourages connections and fosters relationships with other team members
4. New hire has a clear understanding of their role within the team and current remote working environment
5. New hire has tasks/projects they are able to accomplish given their current state

Manager's Checklist

Prior to first day:

☐ Complete Workday Onboarding set up tasks within Workday. If this is not completed, your new hire will not be able to access Workday Onboarding on their first day. There is an Onboarding Setup Workday job aid to support you.

☐ Ensure new hire is included in all team meeting, mailing lists and any online channels used by your team for project work and social connection

☐ Ensure new hire has the hardware and software needed to be successful remotely. Request this from IT (central or inhouse depending on your department) **two weeks** prior to new hire's start date https://it.ubc.ca/ubc-it-guide-working-campus

☐ Schedule daily check ins with new hire during first week (can be less frequently after this as comfort builds)

☐ Have team members schedule welcome conversations with the new hire in their first few weeks (to build trust through social engagement)

☐ Have team prepare a short bio with photo, contact details and remote working style. This should be compiled and shared with the new hire in a welcome message on their first day

☐ If desired: select a team member to act as a buddy for new hire. Team member should have a clear understanding of their role and time commitment. A buddy is someone who will introduce team culture, and who the new hire can connect with when they have questions. The buddy should also be available for informal "coffee chats" to help create connection and trust

Within the first week:

- ☐ Ensure new hire has completed the following:

  - Set up Enhanced CWL (https://privacymatters.ubc.ca/learn-about-enhancedcwl)
  - Required mandatory trainings (approx. 2.5hours)

    - UBC Vancouver https://wpl.ubc.ca/?query=UCGLRD
    - UBC Okanagan https://wpl.ubc.ca/?query=UBC%20Mandatory

  - Completed payroll, benefits and pensions enrolment tasks in Workday
  - Review personal and contact information for accuracy in Workday
  - Review Orientations & Onboarding website (https://hr.ubc.ca/working-ubc/your-first-days-ubc)

- ☐ Manager to have introductory 1:1 conversations for first few days

  - Introduce team landscape/projects/initiatives that the new hire will be working on and responsible for
  - Share remote working style and remote work expectations
  - Build trust

- ☐ Encourage ergonomic set-up of remote-workstation (https://hr.ubc.ca/health-and-wellbeing/ergonomics/office-ergonomics/working-remotely-ergonomics)

- ☐ Schedule a virtual team meeting for introductions (when possible, use video conferencing technologies to facilitate interpersonal communication)

- ☐ Provide overview of the technology available/ what the team uses

- ☐ If applicable: Ensure new hire is met on their first day by the correct person onsite for IT set-up
- ☐ If desired: Buddy to offer frequent check-ins with new hire

Within the first two weeks:

- ☐ Have team members to schedule peer-instructional sessions to train new hire on relevant applications and processes they will be using

- ☐ Encourage your team to connect socially with new hire over online collaboration channels

- ☐ Provide tasks that can be accomplished while working remotely. Consider what level of access and equipment your new hire currently has (consider an outcomes-based approach to work over hours worked)

- ☐ Provide time to become familiar with the following initiatives:

  - UBC's Strategic Plan (https://strategicplan.ubc.ca/)
  - Focus on People (https://focusonpeople.ubc.ca/)

- Wellbeing Strategic Framework (https://wellbeing.ubc.ca/framework)
- Inclusion Action Plan (https://equity.ubc.ca/about/strategic-planning/ubcs-inclusion-action-plan/)
- Indigenous Strategic Plan (https://indigenous.ubc.ca/indigenous-engagement/indigenous-strategic-plan/)

☐ Provide time to review role specific information and documentation

☐ Consider that "overcommunicating" is helpful in this time of uncertainty. Anything less could lead to a sense of isolation for new hire

Within the first three months:

☐ Schedule regular check-ins

☐ Prepare your new hire for a performance conversation within their probationary period (https://hr.ubc.ca/career-development/performance-conversations)

☐ Tips for successful performance conversations:
  - Performance is owned by the person so ensure they talk more than half of the time.
  - Encourage dialogue by asking open-ended questions such as "Tell me more about …", "Help me to understand…", "How can we…" etc.
  - Provide constructive feedback that focuses on the work performed.
  - When ending the conversation, ensure they leave with a sense of achievement, clarity and purpose.

Additional resources for managers:

- https://ubc.service-now.com/selfservice
- https://it.ubc.ca/ubc-it-guide-working-campus
- https://hr.ubc.ca/managers-admins/onboarding-new-employees/new-employee-checklist-and-orientation
- https://hr.ubc.ca/working-ubc/remote-work-arrangements
- https://wellbeing.ubc.ca/workplace-wellbeing-resources
- To support teaching at UBC:
  - https://keepteaching.ubc.ca/
  - https://ctlt.ubc.ca/

Share your feedback: If you have any questions or feedback on ths resource, please contact workplace.orientations@ubc.ca