



Onboarding and Offboarding Team Members in a Remote Work World

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Workshop Goal: identify best practices for onboarding and offboarding remote team members, including three key action steps

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OUTLINE

Part 1: Remote Work Trends

Part 2: Effects of Strong Onboarding

Part 3: Onboarding Best Practices

Part 4: Offboarding Best Practices

Part 5: Q + A

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Remote Work Trends

Remote Workers are
13% more productive
than office colleagues

WFH has grown by
173% since 2005

74% of workforce would
prefer to quit a job for one
that offers remote position

Effect of a Strong Onboarding Process

2X

New hires are 2x as likely to leave an employer
who mishandles onboarding

\$35k – \$55k

Cost to replace employee with a
salary of \$75k

ONBOARDING

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Small Group Discussion

What are some of the major challenges that get in the way of you successfully onboarding remote team members?

**5-MINUTE
DISCUSSION**

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Major Challenges

Loss of in-person connections,
community

Solitude of WFH

Company adjustment

Team member adjustment

Preboarding Checklist – New Hires



Welcome Materials



Paperwork



Schedule + first week expectations

Preboarding Checklist – Existing Team Members



New team member introduction



Suggested ways to welcome



Share schedule

Onboarding Best Practices – New Hires

Expectations

Expectations



Productivity, responsibilities, performance, communication, company values



WFH Policy



Setting milestones, goals and timelines

Onboarding Best Practices – New Hires

 Expectations

 Support Systems

Support Systems



How are you going to replace “watercooler” conversations?



Mentorship



Consistent check-ins

Onboarding Best Practices – New Hires

Expectations

Support Systems

Training –
Remote Tools

Training – Remote Tools



Consistent schedule



Follow up



In-house tutorials / library

Onboarding Best Practices – New Hires

Expectations

Support Systems

**Training –
Remote Tools**

Security

Security Issues



Spelled out in WFH policy



Outline best practices



Develop checklists

Onboarding Best Practices – New Hires

Home Office

Home Office



What resources / guides are you offering to set teams up for success?



Designing remote workspaces

Onboarding Best Practices – New Hires

Home Office

Company Culture

Onboarding Best Practices – Existing Teams

Welcoming

Promoting Friendship /
Inclusion

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Small Group Discussion

What are some of the resources you've found to be helpful in the remote onboarding process?

What's one new idea you want to implement?

**5-MINUTE
DISCUSSION**

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OFFBOARDING

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Offboarding Best Practices

Offboarding Checklist

Transition

Exit Video Call

Involuntary Exit

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Offboarding Checklist



Map a step by step process



Equipment return



Access to company information

Transition



LinkedIn Recommendation



Show appreciation – final team meeting



Inform team members of next steps

Exit Video Call



Same general procedures



Script out the interview



Exit Survey

Involuntary Exit



“If X, then Y”



Set up “next day” discussions

Small Group Workshop

Identify three specific things you're going to do to start to build / revise your onboarding or offboarding processes.

* Focus on specific actions.

**10-MINUTE
INDIVIDUAL
WORKSHOP**

Final Thoughts



Create systems



Ask for input



Focus on People

Questions

Let's Connect



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