



## Onboarding & Managing Remote Workers

August 20, 2020

Dear Friends & Clients,

Recent employment data suggests that hiring is picking up in certain sectors of the economy and employers, like you perhaps, are tasked with sourcing, onboarding and managing new team members in a remote and vastly new way. As you are acutely aware, a new hire's first days, weeks, and months establish the foundation for the rest of the employment relationship.

Consider these guidelines to help remote employees get started on the right foot:

### **#1: Start early**

Once the applicant accepts your job offer and completes any post-offer screening, begin the process of welcoming them to your company. Send an email confirming their start date, expressing your excitement that they'll be joining the team, and letting them know that you're available to answer any questions they may have. Ensure that any equipment and supplies the new hire needs are delivered to them by their first day and that IT systems are ready for them.

### **#2: Assign a buddy and/or mentor.**

Inform existing employees of the new hire's start date and explain their role, areas of focus, and relevant work history. Assign a buddy or mentor to help the employee with their transition. Consider matching new hires with existing employees who have experience with working remotely.

### **#3: Set expectations.**

Schedule a video conference or phone call for the employee's first day to set expectations. During the meeting, provide your new hire with an agenda for the first week or two. Review job responsibilities, objectives, and expectations and explain how their role contributes to the success of the company. Instruct the employee to review your employee handbook and discuss key issues, such as work schedules, timekeeping practices, and how performance is measured. Obtain the employee's electronic acknowledgment of the handbook and retain it in their personnel file.

### **#4: Complete new hire paperwork.**

Consider how you plan to complete new hire paperwork for remote employees, including a Form I-9 and federal and state tax withholding forms (W-4). Keep in mind that you also need to provide new hires with the ACA Notice of Coverage Options and any required state and local notices. Additionally, ensure that remote employees complete an emergency contact form and receipt of company property. In many cases, employers can satisfy notice requirements virtually by distributing electronic versions of the required notices. However, employers may need to consider other options, such as a drive-up process, for certain new hire paperwork. Check applicable federal, state, and local laws to ensure compliance.

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#### **#5: Make introductions and promote communication.**

Within their first few days on the job, use video conferencing to help introduce new employees to key members of the company and their team. These introductions typically only take a short amount of time but can go a long way in helping employees feel welcomed. Have a few questions ready to spark conversation and allow the team to get to know one another. Then, schedule regular virtual meetings between remote employees and their co-workers. Also, hold supervisors accountable for maintaining communication with remote employees and including them in key meetings.

#### **#6: Address training and development.**

Ensure the employee completes required training, such as sexual harassment or safety training, as well as training on your company's mission, culture, and procedures. While many types of training can be provided remotely, federal, state, and local laws may have specific requirements for who can lead the training and what it must include. Check applicable rules to ensure compliance. Supervisors should also start a dialogue with new hires about their career interests and identify training and career development opportunities that may help them reach their goals. Career development is particularly important to address with remote employees, who sometimes feel there are more barriers to advancement since they aren't as visible as employees working in the traditional workplace.

#### **#7: Check-in and provide feedback.**

Schedule regular calls or video conferences to check-in with new hires to see how they're transitioning into their new role and into remote work, and if they need any additional training or further clarification on workplace expectations. Supervisors should also provide performance feedback immediately following a behavior they'd like to reinforce or address. Also consider conducting a more comprehensive evaluation at regular intervals (such as every 90 days), especially during their first year on the job. Train supervisors on how to provide effective feedback and coaching.

#### **#8: Recognize remote work.**

A common complaint among some remote employees is that their work isn't as valued as, or is less visible than, employees who are working at the traditional workplace. Make sure you are recognizing remote employees for their contributions by giving them praise for good work and highlighting their accomplishments with other employees.

#### **#9: Consider teambuilding activities.**

Consider teambuilding activities in which both remote employees and employees on-site can participate. For instance, some employers host virtual happy hours or ice cream socials for employees. Another option is competing in online trivia, puzzles, or other games.

#### **#10: Evaluate.**

Solicit feedback from remote employees, and anyone else involved in the onboarding process, about their experience. Use that data to make improvements or adjustments.



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Please pass this communication along with our contact information to others that are important to you and that you believe would benefit from this information. If you found this to be informative and useful, please let us know.

As always, we value your trust and relationship.

Kind Regards,

SAGE Private Wealth Group

*We act with purpose, are intentional with our advice, and serve as a catalyst to help our clients create a lasting legacy.*

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