



The Ultimate Guide to Onboarding Salesforce Talent Remotely

By Lee Durrant



The coronavirus outbreak has caused the way we live and work to change dramatically. For many organisations, finding virtual solutions to new problems has become a way of life.

Though there is a light at the end of the tunnel, the pandemic and its impact on the way it has shaped our workplace practices will stay with us for many years to come.

Virtual interviews and remote onboarding – both practices which were uncommon before the pandemic – have been adopted by a growing number of organisations as a preferred way to integrate new team members, many of whom now prefer to work away from the ‘office’.

When building your team, hiring is only half the battle. Correct onboarding techniques must be in place to ensure your new team members integrate successfully; only then will they thrive and add value to your team. Adding the challenge of physical distance into the mix can mean that onboarding remotely can be challenging unless the right system is implemented.

Virtual onboarding is popular in tech-heavy industries, of which The Salesforce ecosystem is one.

The focus of this report is onboarding remotely – I’ll go through best practices, common challenges and at the end, there’s a checklist for a foolproof virtual onboarding process.

So, let’s get started.

Lee



The Rise of Remote Onboarding

With the rise of the internet, the number of people working from home has increased steadily year on year. In the decade from 2008 – 2018, the amount of UK remote workers increased by 25%.

A 2019 survey found that globally, 61% of employers allowed their employees a level of remote working, and a staggering **76% of workers said** they would be more loyal to their employers if they had flexible working options.

And with new **post-pandemic research by Microsoft** uncovering that nine out of 10 (87%) employees reported their businesses have adapted to hybrid working – remote hiring and onboarding are now more commonplace than ever.

While for some businesses, current circumstances dictate whether they onboard remotely or not, and for many organisations, it has become standard practice.

IT giant **Dell use remote onboarding** as part of their standard hiring process due to their widely dispersed workforce. A spokesperson from Dell has said about their system, “*We have all of our onboarding materials in a digital format, including a website, documentation, and video. We also have a Day 1 success team that is dedicated to providing support via chat/IM, email, and calls during the early part of onboarding.*”

Online billing software providers Chargify also uses technology to remotely onboard; they schedule Facetime meetings between new employees and managers during the early stages.

As you can see, it is essential to have a tried and tested, robust remote onboarding process if your virtual employees are going to be onboarded successfully.

First, let's look at the start of onboarding which is now the virtual interview; let me explain more.

Virtual Interviews

Despite the huge increase during Covid-19, an entirely remote interview process is still relatively uncommon in Salesforce. Many hiring managers still like to get to know candidates in person, as it is easier to strike a connection this way than via a webcam.

However, if necessity means that you must interview fully via video links, this does not have to be a barrier to a successful hire. Moving your interview process from real-life to online can seem strange at first, but it works successfully for many organisations worldwide; all it takes is a little preparation and patience.

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A video interview can seem slightly less formal than a standard interview, and that's fine. You can still uncover the information you need from your candidates, just in a slightly different way.

Video interviews also tend to be longer, more chatty affairs. Time expands because it can be more challenging to strike a real connection due to the barrier of the video – it might take a little longer for both interviewer and interviewee to relax into the situation.

So go into your video interviews with a view that it is about opening up a real two-way conversation so that both parties involved feel as though a genuine connection has been made.

Video interviewing might mean that you conduct three interviews instead of two or that the interviews themselves are longer and a slightly different style from the 'standard' Salesforce interview. For hiring managers video interviewing for the first time, the process will feel unfamiliar, but as with everything, the more you practice something, the more familiar and easier it becomes.

The following are key points to incorporate into your virtual Salesforce interview strategy:

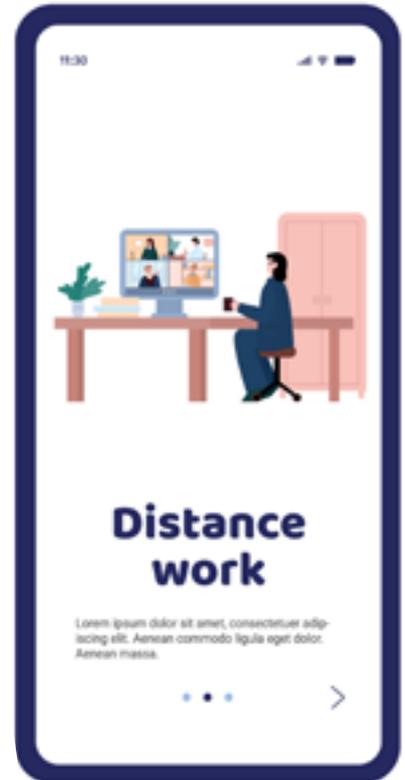
- Back to basics – Join the video early so that interviewees don't think they've got the wrong link and remember the small talk – putting the candidate at ease is vital.
- Stay present – it can be tempting to multitask while on an interview, but remember to give the candidate your full attention and critically eye contact; not always as easy when using a webcam.
- Prep your candidates – giving candidates a rundown of what the interview sequence will look like to help them prepare

After the interview process is complete, and you know you will be handing out job offers, next comes the contractual step – let me share how to navigate this stage.

Virtual Contract Signing

Once you've found the new Salesforce talent you want on your team, it's time to get them officially onboard.

As this process usually happens via phone and email, it shouldn't be too different for candidates who have been virtually interviewed. It just means that if you want them to sign their contract before their start date, you will need to use eSign software. Many eSign applications will also enable you to see scans and copies of ID documents you require too.



Once you've found the new Salesforce talent you want on your team, it's time to get them officially onboard.

'Ghosting' isn't just a phenomenon of the dating world. At this stage, it is essential to keep in close contact with your new employee. If they don't sign their contract straight away, it might be a simple miscommunication or a sign of something more serious. So keep in regular contact to make sure you and the recruit are on the same page at all times.

Remember to keep in contact with your **Salesforce recruiter** at this stage, who will be able to ensure a smooth transition from signature to start date.

Remote Onboarding – Challenges

There is a well-known saying that 'forewarned is forearmed', so as a first step, let's look at the most common remote onboarding challenges.

After the interview and job offer stage, the most significant issues can arise while remote onboarding comes from communication breakdowns.

It's not until employees start working from home consistently do they appreciate how integral their working day is for gleaning information from their team and their manager.

This process generally goes unnoticed in the form of a quick chat in the corridor or a coffee together in the chill-out room.

Clear and Prompt Communication

Perhaps the most crucial part of onboarding a new employee successfully is making them feel as though they have all of the information they need to hit the ground running.

It's not unusual for some teething niggles when onboarding a new starter, but these problems can be exacerbated with the added challenge of distance and potential time differences.

A good idea to eradicate any uncertainty your virtual new starter might feel is to check in with them multiple times a day at first, three times per day (allowing for time differences) for the first two weeks, then once per day for the following two weeks as a minimum. This way, they know that they have regular points to ask any questions and consequently they don't feel neglected either.

Salesforce.com has an advantage over other organisations by having a range of tools to aid communication, which we will go through in the next section.

Company Culture

Your company culture is a critical component of what your business stands for and how it operates – it should form part of your company DNA.

- What does your company culture encompass?
- Do you have a code of conduct?
- A vision and mission statement?
- Do you have certain things you do daily or weekly, such as lunch meetings, catch-ups, or Friday round-ups?

Of course, it's not feasible for remote employees to physically join in with team lunches but include them as much as you can. If there are no time difference restrictions, have them join meetings via video and keep them informed about what's going on in the office regularly regarding the business and the team.

Part of the allure of Salesforce is the platform's gamification, and you can use this to your advantage when onboarding new starters. Keeping their role fun will add to an overall positive onboarding experience.

Loneliness

A big part of starting a new job is the camaraderie of meeting your new colleagues, forming new relationships and feeling part of a team. All of these essential points can be easily overlooked when your new team member is physically somewhere else.

As a manager, you will be the person your new employee spends most of their time communicating with throughout the hiring and onboarding process; however, it is essential to remember to include the rest of the team.

A group Zoom or MS Teams call to welcome the new employee is a great idea, and you can do this regularly, maybe once a week for a month, so that the new employee feels a sense of belonging within the team, despite being physically distant.

Encourage your team to message the new starter via social apps, and doing this before they officially start can be a nice touch.

Identifying an appropriate 'buddy' from within your team for your new hire to talk to is key; remember when you first joined an organisation? There were some things you didn't want to ask your manager!

Encourage your team to message the new starter via social apps...

Virtual Onboarding – Best Practices

Some employers have understandably been waiting for the dust to settle before making permanent changes to their onboarding procedures.

But what we know for sure is that Salesforce professionals are keen to continue to work from home, which means you need a strategy to cover the possibility of 100 per cent virtual remote onboarding in future.

In a survey we recently conducted on LinkedIn, Salesforce professionals voted overwhelmingly to keep working from home as a viable option.

Only 7 per cent of participants stated that they want to work from the office full-time in future, while the remaining demographic was split between remote working and a hybrid mix of both at 46 per cent and 47 per cent, respectively.

You can check out the [full results of the survey here](#).

So, how can you ensure you give your new remote employee the best start to their new contract? The following are best practice strategies to follow for perfect virtual onboarding.

The Practical Logistics of Working From Home

Check with them that they have a suitable workplace, such as a home office or dedicated working space. If it's their first time working from home, do they need any support or advice in creating a home working space?

Determine their Wi-Fi needs – if they will be using their own Wi-Fi, is it strong and secure enough to meet the needs of their new role? If not, you will need to supply them with an alternative internet supply such as a modem or a mobile broadband device.

And you don't have to wait until the official start date to initiate the onboarding process. Salesforce suggests using their [Trailhead](#) platform to help integrate the new employee into your team with some easy upskilling tasks to get them in the flow.

Additionally, make use of the many communication tools available from Salesforce.

Enterprise Social Network [Chatter](#) is great for introducing employees to the team virtually.

The First Day and Week

Make sure your new starter has all of the physical equipment they need.



Though I am sure you will have this in hand, their tech stack, PC, screens, cameras, headphones, company stationery, branded items, and a welcome 'present' should arrive ahead of time.

You might be surprised how many candidates have come back to us aghast at arriving on day one without a desk, PC, let alone an email address being ready for them.

Produce a new employee plan for their first day, week, and beyond for video or phone check-ins; that way, they know what to expect at different stages of their first few weeks.

Keeping Connected

From the moment of the job offer until your employee is fully onboarded can take up to a year.

Salesforce is one of the best companies in terms of remote onboarding – there is a tool for everything you need to help integrate your new employees.

For example, **Salesforce Anywhere** allows virtual employees to connect with their team, as the name implies, anywhere and any time.

But remember that as Salesforce is full of tech to help people connect, it is not usually in this area where your onboarding process might be lacking. Making the human connection with new employees, getting their new colleagues to reach out and re-create the company culture that might have been affected by remote working; this is where you can make an impact with the success of your onboarding.

Allowing new starters access to as much information as possible is key to a successful process. Create an information hub so that everything your new employee needs is all in one place – it can be confusing for a new team member when they are bombarded with information across different platforms.

Salesforce Concierge is a Google-like single-search box experience where employees can find anything and everything they need to know about their role.

Your Employee Experience

The Employee Experience is fast becoming one of the most critical measurables for retaining talent, and this is something to think about during your onboarding process.

Treating your employees like customers is the secret to a great Employee Experience, and this is at the heart of **Salesforce's Work.com**, the tool that allows staff to stay engaged and informed with their work.



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Managing the Employee Experience is critical, especially in our post-pandemic world.

Salesforce.com states, *“Work.com brings together the full power of Salesforce Customer 360, health experts, business leaders, and the Salesforce partner ecosystem to equip your teams with the tools they need to be productive, safe, and resilient.”*

Features of Work.com that will be helpful during the onboarding process include:

- Employee Wellness Check – this feature enables businesses to securely survey their employee regarding their wellness and gain insights into the wellbeing of the whole team.
- Shift Management - this add-on helps balance workplace coverage and employee availability and is vital for ensuring proper management of working times to help virtual employees manage their time.
- Employee Learning and Wellbeing – these kits from Trailhead provide learning and wellness content to help upskill your employees, which can be valuable when training new employees.

Finally, here is a checklist of everything to consider when virtual onboarding.

Virtual Onboarding Checklist

- During the interviews and job offer stage, set clear expectations of what the role entails, the hours of work, and any routine (daily/weekly meetings).
- In the time between the job offer and their first day, check in regularly via email or a phone call.
- Ask the new employee to scan or email over the details you need to add to payroll, plus copies of passport, birth certificate and other forms of ID.
- Send collateral, software and hardware.
- Get the new employee set up on the critical systems such as email, Office 365, cloud systems etc.
- Add the new employee to Whatsapp/Facebook or other messaging groups.
- Set up your new employee with internal Salesforce communication tools such as Salesforce Anywhere and Chatter.
- Add the new employee on social media such as LinkedIn, and get their new colleagues to do the same.
- Send an induction/welcome pack containing information about the company.
- A couple of days before their official start date, check with them that everything is ready and they've got everything they need.
- Set up reminders for video calls for daily and weekly induction check-ins.
- On the first day, conduct a video induction going over the role, duties, expectations and company culture.

This guide and checklist will help your remote onboarding practices going forwards. And remember, remote onboarding does not have to be challenging; it can be simplified when you follow cohesive processes.

Next Steps to Onboarding Your New Salesforce Talent?

If you are still at the stage where hiring and onboarding your next succession of Salesforce talent, we can help.

We have been helping businesses locate, recruit and onboard Salesforce talent virtually throughout the pandemic; we can give you the advice, support and tangible help you need to onboard your next Salesforce employees.

However you want to improve your recruitment strategies and results this year, we can help. To find out more about our recruitment services, contact us today on 01322 272 532 or [contact us here](#).

Thanks,

Lee





About Resource On Demand

Resource on Demand is Europe's first specialist Salesforce Recruitment Company.

We assist innovative and disruptive organisations to grow their Salesforce technology teams. In addition, we support companies to fill technology roles that span across Digital Marketing, Marketing Automation, Human Capital Management and the growing Salesforce.com suite of skills.

The team at Resource on Demand have access to an extensive database of key talent, registering over 8000 professionals each year.

To find out how we can support you with your Salesforce recruitment, call us on **+44 (0) 1322 272 532**

Lee and Theresa Durrant





Here's What Clients and Candidates Have To Say About ROD

Job Seeker

The consultants I have interacted with were very professional, efficient, well structured and friendly. I felt comfortable in working with them and I would highly recommend them and you as an agency for the future, for sure. Great team. Great work! Well done!

Digital Marketing Job Seeker

Ryan is a great professional who stayed in touch throughout the whole process. He was very responsive but also extremely knowledgeable in the field that I'm working in and knew exactly what I was looking for. Ryan made good recommendations and it was always great to have a conversation with him. I couldn't ask for a greater professional than him.

Consultant seeking work

Resource On Demand is without doubt the best Salesforce recruiter in the industry. They have a unique personal approach to recruiting that is rare for recruiters in any sector, and unlike many recruiters they actually care about where people end up! As a previous user of their services from both sides, I can vouch for their integrity and determination to find the right role for the candidates and the right candidates for the company. Keep up the good work guys!

Global Salesforce.com Manager

We would highly recommend ROD as a recruiter for client side resource and we would certainly use this recruiter every time we need new Salesforce.com skills!

*'Great team.
Great work!'*