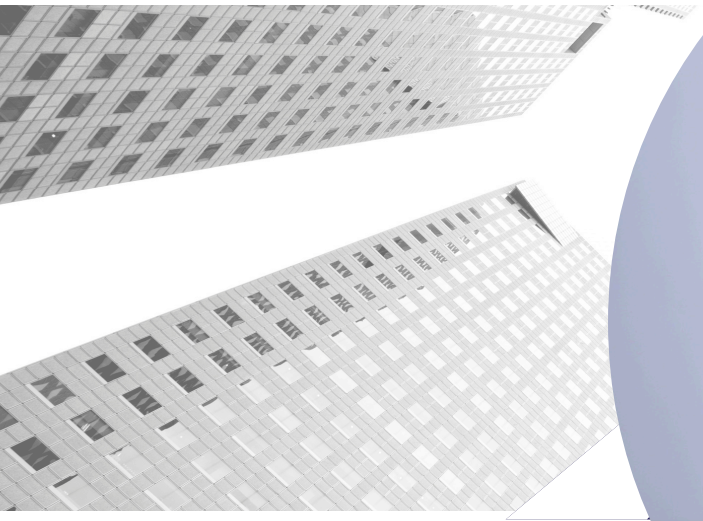
Onboarding New Employees Guide





Unlocking Potential, Driving Growth

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More Information

www.resourceondemand.com

Introduction

The way we live and work has changed dramatically, making virtual solutions and remote onboarding a standard way of life for many organisations.

When building your team, hiring is only half the battle. Implementing correct onboarding techniques ensures new team members integrate successfully, thrive, and add value. This combined guide provides a strategic framework for interviewing, integrating, and objectively measuring the success of your new hires—whether they are working on-site, remotely, or in a hybrid model.

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.

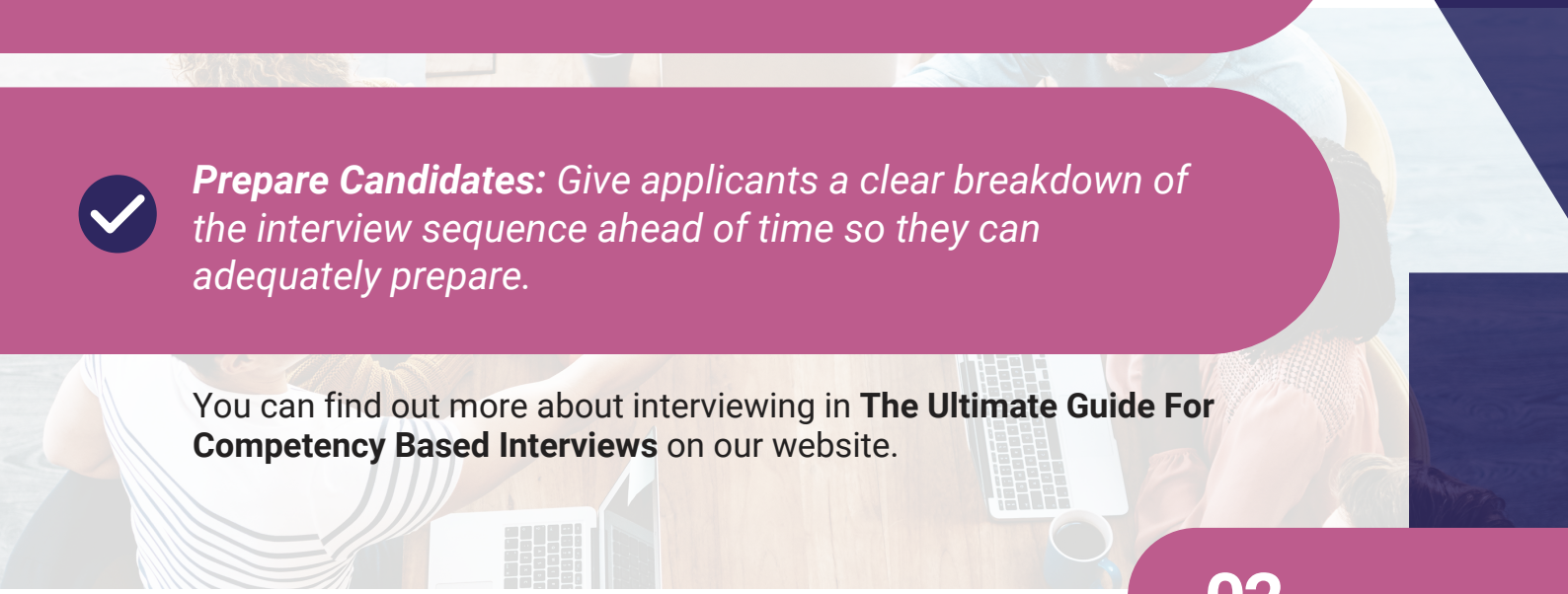


The Virtual Interview and Contract Stage

Moving your recruitment online requires intentional preparation and patience to build a genuine connection through a webcam.

Virtual Interview Best Practices

- ***Embrace a Different Pace:*** *Video interviews are often longer and more conversational. Because building a digital connection takes more effort, plan for a slightly longer process or add an extra interview step compared to a standard interview sequence.*
- ***Back to Basics:*** *Join the video link early so candidates know they have the right link. Dedicate time to small talk to put the candidate at ease.*
- ***Stay Present:*** *Avoid the temptation to multitask. Give the candidate your full attention and maintain regular eye contact.*
- ***Prepare Candidates:*** *Give applicants a clear breakdown of the interview sequence ahead of time so they can adequately prepare.*



You can find out more about interviewing in **The Ultimate Guide For Competency Based Interviews** on our website.

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Virtual Contract Signing

Once you've found the new Salesforce talent you want on your team, it's time to get them officially onboard. Once you extend a job offer, keep momentum using eSign software to officially execute employment contracts and securely scan mandatory identification documents.

Important Note: *"Ghosting" can happen during the hiring stage. Keep in close, regular contact with your recruit and your recruiter to handle any communication gaps and ensure a smooth transition to their start date.*



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Overcoming Remote Onboarding Challenges

Physical distance and time differences can introduce unexpected friction if not proactively managed. Identifying these barriers early protects your company's reputation and preserves employee morale

Communication Breakdowns:
New remote workers frequently miss the incidental information gathered during casual corridor chats or coffee breaks. To counter this, implement a rigorous check-in schedule. Check in three times a day for the first two weeks, and taper to once a day for the subsequent two weeks as a minimum.

Loneliness and Disconnection:
Distance can obscure team camaraderie. Schedule regular group video welcomes (e.g., once a week for the first month) to foster a sense of belonging. Have the team welcome the new hire via social messaging apps before day one.

The 'Buddy' System:
Pair your new hire with an accessible team peer. New employees often hesitate to ask their direct manager minor operational questions; a designated buddy bridges this gap comfortably.

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Overcoming Remote Onboarding Challenges

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.

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, catchups, 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.

Operational Logistics and Best Practices

Pre-Onboarding & IT Setup

A major pitfall is allowing a new hire to arrive on day one without their basic workspace infrastructure. Your tech stack, PC, extra screens, cameras, headphones, stationery, and welcome materials should arrive at their home address ahead of time.



Workplace & Wi-Fi Check

Ensure the employee has a dedicated workspace. Validate that their home internet connection is secure and strong enough for their duties. If it is lacking, supply alternative internet access like a mobile broadband device or hardware modem.

Leverage Ecosystem Tools

Introduce your new starter to dedicated internal software platforms early. Use tools like Trailhead for easy upskilling tasks before day one, and configure communication apps like Slack, or Salesforce Anywhere to introduce them to the wider team virtually.

Customising the Experience

Recognise that every employee brings unique skills and learning styles. Conduct pre-onboarding assessments to understand their specific background. From there, tailor personalised training plans, offer self-paced learning resources (such as video tutorials and interactive workshops), and provide flexible onboarding timelines to smooth the transition.

17 Key Metrics for Measuring Success

To continuously optimize your program, you must shift from subjective impressions to empirical, data-driven methodologies. Track these 17 essential metrics to evaluate your onboarding health:



Retention Rate:
The percentage of hires remaining over a duration. A first-year retention rate of 80% or higher is generally considered favourable



Time to Productivity:
The duration required for a new hire to reach full productivity. Long delays pinpoint training gaps.



Engagement Surveys:
Structured feedback loops detailing employee sentiment, job satisfaction, and cultural alignment.



Feedback Participation:
The percentage of new hires actively answering surveys. Low turnouts signal communication or trust barriers.



Manager Satisfaction:
Leaders' satisfaction with how prepared and integrated new team members are.

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Training Completion Rates:
The percentage of required training modules completed. Target a completion rate of 90% or higher.



Peer Integration:
Evaluates collaborative skills and relationship-building through team observations and peer surveys.



Time to First Task Completion:
Tracks how long it takes to finish an initial assignment. Extended timelines serve as red flags for vague expectations



Goal Achievement:
Evaluates how effectively the employee hits initial, measurable performance objectives.



Adoption of Company Culture:
Measures how deeply the new hire understands and embodies the core values and mission.

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Early Performance Ratings:
Quantitative KPIs (quality, deadlines, output) reviewed during probation periods.



Time to First Promotion:
Tracks career advancement. A standard, reasonable benchmark to evaluate high performers is 12 to 18 months.



Mentorship Participation:
Measures the percentage of new starters actively engaging with an assigned corporate mentor.



Manager Check-ins:
Assesses both the frequency and the qualitative value of supervisor 1-on-1 support.



Early Turnover Rate:
Premature departures within the first 3 to 6 months. A rate exceeding 20% points to severe systemic onboarding issues.

17 Key Metrics for Measuring Success

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Performance Improvement:
Monitors specific job metrics over time to verify that onboarding has enhanced job proficiency.

ROI of Onboarding:
Calculates fiscal efficiency. Calculated using the standard formula:

$$ROI(\%) = \frac{\text{Net Benefits - Cost of Onboarding}}{\text{Cost of Onboarding}} \times 100$$

Net benefits include saved turnover costs and output, while costs include recruitment and materials.

The Onboarding Checklist

Use this chronological checklist to maintain a foolproof, cohesive workflow:

#	TASK	DONE
1	Set clear expectations regarding daily responsibilities, expected work hours, and mandatory routine team meetings.	☐
2	Maintain clear, regular communication between the formal job offer and the employee's official first day.	☐
3	Collect payroll details, along with secure copies of government ID, passport, or birth certificates.	☐
4	Ship all operational physical equipment, custom stationery, and welcome corporate collateral so it arrives ahead of time.	☐
5	Provision accounts and set up access permissions for corporate email, storage systems, and Office software suites.	☐
6	Introduce the new hire to internal communication spaces, social workspaces, and team-wide messaging channels.	☐
7	Connect with the new hire on professional social platforms and encourage immediate team members to do the same.	☐
8	Send a digital induction pack outlining business background, company vision, and codes of conduct.	☐
9	Conduct a final check-in two days before day one to confirm all physical gear has arrived and works correctly.	☐
10	Create recurring calendar invites for daily and weekly video induction check-ins.	☐
11	Host an extensive video induction session covering duties, performance expectations, and company culture.	☐
12	Provide a transparent written plan outlining expectations for their first day, first week, and beyond.	☐
13	Launch continuous learning opportunities, including access to online learning modules, webinars, or certification tracks.	☐
14	Arrange for their Buddy to reach out on day one to introduce themselves to the new hire.	☐

Need More Help?

If you need any further assistance or have additional questions, please don't hesitate to reach out! We're always here to help you refine your onboarding process.

Ready to get going?

All the Best

Lee and Theresa

About Resource On Demand

Let's grow together.

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

We've been working in the Salesforce and SAP space since 2007, assisting innovative and disruptive organisations to grow their digital transformation teams. We've been supporting companies of all sizes to fill roles that span across Salesforce, SAP, digital transformation, marketing automation, data management, Human Capital Management, both contract and permanent.

The team at Resource On Demand have access to an extensive database of key talent, across the UK, Europe and the US.



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