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# COVID-19: *Work, Workforce and Workplace*

The response to **COVID-19** will require many questions to be addressed across the work, workforce and workplace ecosystem.

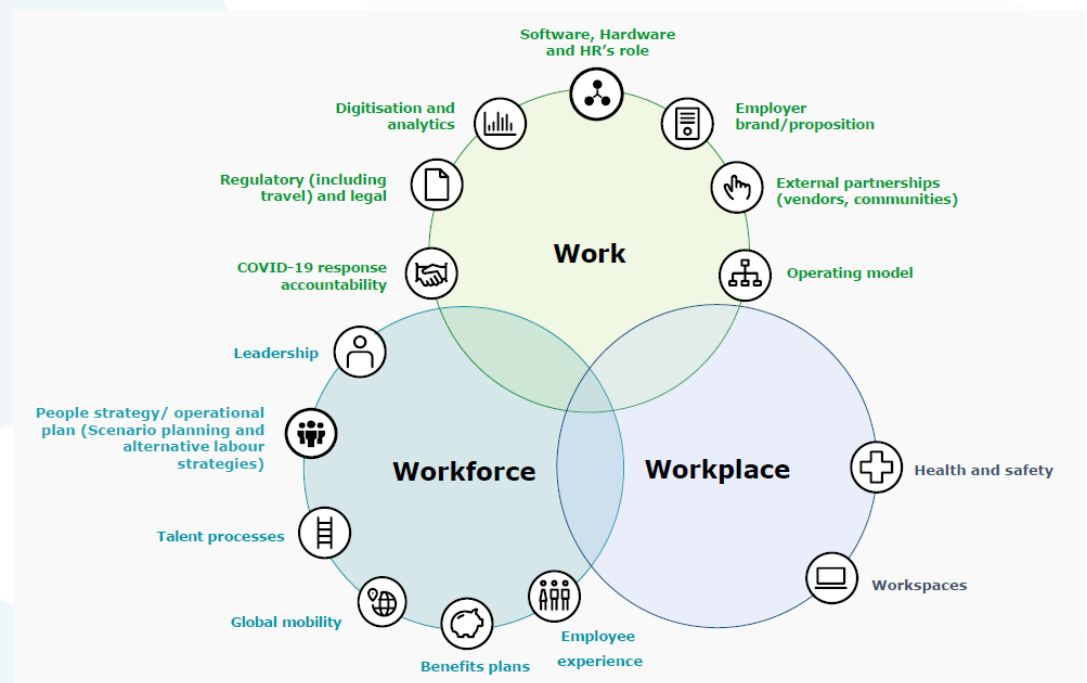
COVID-19 has served as a **catalyst** in changing the ways an enterprise **organises, operates and behaves**.

Many changes that organisations have implemented will be **short term** in nature and a direct requirement of continuing operations during the peak of the pandemic.

As restrictions are lifted, businesses will have to **evolve** their current plans,

whilst also considering what the **longer term impact** is on the construct of their respective **ecosystems**, and the key choices they will make to operate going forward.

Determining what this means for Work, the Workforce and the Workplace will be critical; and the following serves as a **mechanism** to address many of these key questions.





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# Work

# Work: Are we returning to the way we worked before, or adopting new ways of working?

## COVID-19 response accountability

### Respond

Dealing with the present situation and managing continuity

### Recover

Learning and emerging stronger

### Thrive

Preparing for and shaping the “new normal”

## Planning and communications

- What steps are required to restart our operations? How do we frame those in a 30-60-90 day horizon? How will we communicate these plans to the business?

- Who are the critical leaders and teams who will continue to play an active role?

- What are we doing and what is the effort required to manage the critical internal and external stakeholder groups that we need to engage through the recovery period?

- Are we adequately “plugged in” to all sources of external resources for updated news (e.g., government, public relations)?

- Are people getting the information they need as they return to the workplace?

- Do we need new tools or technology to enable more effective information flow?

- Have we constructively engaged with employees when carrying out a risk assessment? Are the results of the assessment visible and clearly communicated to employees?

- Have we ensured that actions that are part of the assessment do not disproportionately impact those with disabilities?

- Are we using simple, clear and consistent language and images to communicate key messages, taking into account those groups for which English might not be their first language?

- Do we have agreed-upon scenarios that we will use to frame our decisions?

- What have we learned from our response to this crisis, and how are we updating our emergency response protocols for the future?

- How are we using data and technology to sense what might be coming next?

## Partnerships

- What data do we require to make sure we are making effective decisions about the COVID-19 impact (e.g., the deployment of resources, reskilling staff)?

- How do we make sure we continue to get the best and most up-to-date information on the health and safety of our business and our people?

- Are we using analytics and dashboards effectively to inform decision-making? If not, where can we start?

- How will we detect how many COVID-19 related issues we have in our workforce and where they are?

- What KPIs can we set to understand the effectiveness of our response at various stages (e.g., anticipating a crisis, T-24 hours)?

- What processes are we implementing to ensure the command centre team is regularly reflecting on lessons learned to change as needed?

# Work: Are we returning to the way we worked before, or adopting new ways of working?

## Operating model

### Respond

Dealing with the present situation and managing continuity

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## Nature of work

- What are the immediate places where we have had to change the nature of our work (e.g., virtual meetings/work from home call centres)?

- Have we defined the new missions/outcomes we need to achieve through our work and how does this change our ways of working?

- What did we learn about workforce productivity? What lessons can we apply moving forward?

- Have we determined what work can shift to virtual—on a temporary or permanent basis?

- What impact have changes to our work and collaboration had on the capabilities we require? Can we consider where

- What capabilities are most valued as we evolve work priorities and outcomes?

- What technology, automation or machines may be able to enhance our “human work”?

## Org. structure and collaboration

- Have we had to make any changes to team structures or reporting lines? Are they temporary or permanent?

- How will we perform with a more dispersed workforce and how will we manage risk and supporting employee processes?

- Where can we leverage the insights from organisation analytics to understand the formal and informal networks that underpin our organisation, and where there are best opportunities to drive greater collaboration and efficiency?

- Where are we finding good examples of teams collaborating across our organisational boundaries and how can we emulate?

- Have we had to make any changes to team structures, succession plans or reporting lines?

- What role do trust, psychological safety and influence play in our networks?

- Have we effectively changed our norms for collaboration (e.g., video calls, instant messaging)? Where are there early examples of teams and leaders piloting these norms?

- Have we been able to experiment with cross-functional teams during the crisis? Where might there be opportunity to do more of this, as we work toward a new normal?

# Work: Are we returning to the way we worked before, or adopting new ways of working?

## Employer brand/ proposition

### Respond

Dealing with the present situation and managing continuity

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Preparing for and shaping the “new normal”

## Reputation management

- Has our response to COVID-19 left us with additional work to resolve outstanding reputational work challenges

- Have we effectively engaged with our workforce and do we need to do anything separately?

- Do we have the right processes in place to measure workforce sentiment?

- How do we make sure we are maintaining and elevating our employment brand across current and future prospects?

- Has our reputation changed through the crisis, through either our own actions or those of our industry? How do we want to continue or reverse this shift?

- Will our employer brand need to change in the future?

# Work: Are we returning to the way we worked before, or adopting new ways of working?

## Software, hardware and HR's role

**Respond**  
Dealing with the present situation and managing continuity

**Recover**  
Learning and emerging stronger

**Thrive**  
Preparing for and shaping the "new normal"

### Collaboration and connectivity

- When we first mandated our work-from-home policy, we may have introduced various software. Moving forward, should our people use a common collaboration platform or should we allow individual teams to choose?
- What features do we feel will be most important to enable continued connectivity of our dispersed workforce (e.g., video, whiteboards, simultaneous document editing)?

- What tools and platforms continue to be most effective for supporting a blend of physical and virtual work? How are we understanding employee preferences?
- Are there any persistent challenges our employees are facing with existing platforms? Where can we make enhancements?

- How do we remain on the cutting edge of remote working and other types of software offerings, to increase productivity and keep us prepared for future disruption?

### Cyber security concerns

- Have privacy concerns been adequately addressed?
- Have cybersecurity concerns that come with a dispersed and remote workforce been effectively addressed? Do we foresee others?

- Are there shortcuts that were developed during the crisis that need to be reversed? Are there any behaviours we need to promote with employees to ensure the continued reliability of our systems and infrastructure (e.g., direction to preserve bandwidth)?
- Was any hardware provided to employees that needs to be returned (e.g. monitors)?
- Will we allow the continued use of personal equipment that may cause security risks?

### Collaboration and connectivity

- Do we have sufficient infrastructure (e.g., bandwidth, access licenses) to manage remote work at scale?
- What hardware challenges have our employees encountered while transitioning to remote work (e.g., difficulty procuring office tools)? Have these challenges been addressed?
- How can we best partner with IT leaders to anticipate use patterns and needs in mobile devices as we shift our patterns of working (e.g., continued prevalence of remote work, less travel, return to physical workspace)?

### Remote working tools

- Do we need to revise the processes we have in place to provide easier access to remote-work hardware (e.g., monitors, printers, docks, headphones) in the future?
- Should we invest in remote work technologies or expand use your own device' programs, including subsidies (e.g., laptops) for workforce segments that did not have them before?
- How do we ensure that the workers have what they need, should there be a recurrence of COVID-19?

# Work: Are we returning to the way we worked before, or adopting new ways of working?

## Digitisation and analytics

### Respond

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#### Digitisation

- Were there HR processes that were difficult for our team to complete during the crisis that could be automated?

- What work can still not be completed because information or resources have not been fully digitised, and how can these challenges be remedied quickly?
- What processes and practices are anchoring our employees to the physical workspace? Can these be changed?

- How might we leverage artificial intelligence as a first line of response for employee questions (e.g., chatbots)?

- What services can we offer employees by leveraging AI and robotics (e.g., travel booking)?

- Which of our employee processes are ripe for greater digitisation (e.g., recruitment, onboarding)?

#### Reporting and dashboards

- What employee data was missing during the crisis? Can we remedy this prior to our workforce returning to work?

- What new or enhanced reporting do we need to support the return of our workforce?

#### Measurement

- How are we monitoring the use of HR technologies and platforms, and adjusting our offerings accordingly to best support employees?

- What unstructured data do we already collect that we can analyse to yield deeper insights?

- How might we ethically leverage technology to monitor the engagement, productivity and well-being of our workforce (e.g., wearables)?



# Work: Are we returning to the way we worked before, or adopting new ways of working?

## External partnerships

### Respond

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## Vendor relationships

- What vendor services will be most critical to our recovery?
- Have new needs arisen that require us to procure new vendors?
- Do any of our vendor terms need to be further adjusted prior to bringing the workforce back?
- Do we need to adjust any of our vendor management systems in the immediate term?

- Are any of our strategic vendors now facing serious challenges that threaten our business? In what ways could we support them?
- How has the vendor landscape changed? How do we need to further adjust our vendor strategy?
- How will our physical interaction with vendors work moving forward? What protocol changes have they made?

- Will changes to usage patterns trigger any rebates or cost negotiations with external vendors?

## Partnerships

- What recovery and post-recovery challenges faced by our customers, employees and communities is our organisation now uniquely equipped to solve (e.g., increasing employment opportunities)? Can we think of creative and unexpected ways to help?
- Do we have areas where our business is actually now growing, and where we could use community connections to tap into new talent pools?

- Are there community groups that reflect our purpose that we could partner with to support their recovery efforts?
- Will we allow the continued use of personal equipment that may cause security risks?

- Are there opportunities for us to collaborate and share experiences with other organisations to find solutions for those who have lost their jobs (e.g., how do we re-purpose/transfer skills to build collective bridges for employees)?
- Can we drive this effort to support skills cross-training in our communities on a continuing basis so that our workforce is better equipped for the future?



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# Workforce

# Workforce: How does capacity, capability, & affordability affect workforce design?

## People strategy and operational plan

### Respond

Dealing with the present situation and managing continuity

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## HR planning and people strategy

- How do we need to adjust or reprioritise our people strategy and operating plan?
- How might we need to engage the senior leadership team differently into recovery, to make quick decisions about necessary HR actions?

- What resource reallocations do we need to make within HR?
- How do we channel resources to recovery planning while meeting day-to-day workforce needs?

- As our organisation's next business strategy is developed, how do we ensure the people dimensions are appropriately positioned?

## Scenarios

- Are we adequately integrating our financial plans with our workforce plans (e.g., adopting a common set of scenarios for the enterprise)?
- How are we managing any workforce reduction planning, relative to our business continuity plans?

- What are we doing to ensure our scenarios are agile (e.g. regular monitoring of external changes)?
- What is our strategy for approaching the need for additional workforce reductions in the short and medium-term?

- Are there opportunities for us to collaborate and share experiences with other organisations to find solutions for those who have lost their jobs (e.g., how do we re-purpose/transfer skills to build collective bridges for employees)?
- Can we drive this effort to support skills cross-training in our communities on a continuing basis so that our workforce is better equipped for the future?

## Workforce planning

- What are our critical workforce segments today? How are we prioritising their re-integration (e.g., skill shortages, need for physical customer contact)?
- Of the workforce that we have now, what skill gaps exist? Which do we need to address with urgency?
- Are there alternative types of labour (e.g., gig workers, retirees) that we need to be considering in our immediate workforce resisting efforts?

- Do we anticipate further changes in demand for our services?
- Where do we continue to have critical skill gaps?
- Are we adequately considering new types of labour supply for critical roles/skills or for new emerging needs (e.g. upskilling opportunities, gig workers, retirees)? Are these skills needed onsite or can they be accessed online/in a hybrid work environment?
- Did we adequately predict the impacts to various employee cohorts? Were some hit harder than we expected? How do we adjust our support programs and planning?

- How might we more holistically re-think the composition and size of our workforce into the future (e.g., contractors, vendors)? How important will alternative talent be to our people strategy?
- How has the crisis altered future skill requirements?
- How are we thinking about our workforce in a way that provides us with the greatest flexibility, sustainability and resilience?

# Workforce: How does capacity, capability, & affordability affect workforce design?

## Global mobility

## Respond

Dealing with the present situation and managing continuity

## Recover

Learning and emerging stronger

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Preparing for and shaping the “new normal”

### People

- Have you considered extending/promoting benefits to individuals most impacted by COVID-19? e.g. those unable to work due to being displaced in another location.
- What analysis have you conducted of your mobility data so that you can ensure communications and support are going to the right employees and at the right time?
- Do you need to implement formal employee well-being programmes or provide well-being advice to provide support and foster employee engagement? e.g. video calls, work from home tips, virtual teaming.
- How will you prepare for the return of global mobility and support displaced employees return to their place of work?
- What support will you put in place to limit the effect of ‘reverse cultural shock’ where employees have spent a considerable amount of time social distancing, and in some circumstances, in a country which is not their first language.
- How can you ensure clear and accessible two-way communication channels are in place to disseminate information, engage one-to-one and to allow continuous feedback?
- How will you reinforce commitment to well-being and purpose through a focus on physical, psychological and financial concerns for your internationally relocated employees?

# Workforce: How does capacity, capability, & affordability affect workforce design?

## Talent Processes

### Respond

Dealing with the present situation and managing continuity

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Learning and emerging stronger

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Preparing for and shaping the “new normal”

#### Recruitment

- What are we doing to maintain a talent pipeline even though we may not be hiring?
- Do we need to revisit any recent offers? Do we need to delay any start dates?
- Should we develop relationships with new sources of candidates (e.g. gig platforms)?
- In what areas may we want to elevate our recruitment brand in the market?
- For industries where the crisis has led to rapid hiring, how do we plan for potential shortages in talent supply?
- How might we improve our candidate experience through the use of technology (e.g., AI screening, chat bots, gamification)? Are there circumstances in which in-person interaction is not necessary?

#### Performance management

- To what extent do we need to re-activate our performance management cycle with retrospective reviews for the crisis period?
- How will we adjust metrics for current year evaluations?
- Were there any capability gaps that were identified during the crisis?
- How are we defining performance expectations for modified working arrangements?
- Do we have an adequate approach in place to handle performance reviews?
- Are there tools and resources we can equip managers and employees with to ensure that dialogue is appropriately tailored to changes in performance expectations?
- If virtual work is extended, what changes will be required to manage performance?
- What commitments can/should we be making to our people, when it comes to performance management and promotions in the coming few years?

#### Onboarding

- Which parts of our onboarding can be digitised, to support virtual experiences?
- Do we have the right plans in place now to ensure new hires have the necessary technology and tools, if they will not be in the physical office from the start?
- If we will be onboarding new talent, how are we now ensuring they feel engaged and integrated?
- Are new hires feeling connected to the organisation?
- Do we need to account for changes to our onboarding processes for new types of talent categories (e.g. gig workers, contractors)?

# Workforce: How does capacity, capability, & affordability affect workforce design?

## Talent Processes

### Respond

Dealing with the present situation and managing continuity

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#### Learning and reskilling

- Have our learning resources and tools been able to serve a distributed virtual workforce? Where might we need to invest to support re-integration and be ready for future disruption (e.g. new curated content, apps)?
- Have we identified any areas for immediate reskilling or cross-training, to ensure a smooth re-integration of our workforce?

- What broader reskilling efforts may now be required? Which are our priority areas?
- Can we digitise more of our existing learning content?
- What new learning content might we need to curate/develop?

How do we continue to shift our learning culture, so that our people see learning as integrated ‘into the flow’ of their daily work?

#### Workforce reductions

- Have we adequately considered alternate options to terminations and layoffs (e.g., early retirements, voluntary unpaid leaves with stipend, reduced work weeks)?
- Do our existing processes for terminations need to be adjusted, especially if we need to conduct discussions virtually?

- How are we engaging employees and contractors who may have been laid off because of the crisis?
- What are the learnings we can take from our workforce reduction processes?

# Workforce: How does capacity, capability, & affordability affect workforce design?

## Benefits plans

### Respond

Dealing with the present situation and managing continuity

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Learning and emerging stronger

### Thrive

Preparing for and shaping the “new normal”

#### Plan changes

- Do we need to adjust our plans to create more flexibility (e.g., extended sick leave)?
- Do we need to make further adjustments to our out-of-country benefits?
- Do any of our programs encourage unsafe behaviour (e.g., not reporting infection)? If so, how do we make the appropriate modifications?
- How are our benefit providers reacting to this crisis? How can we work with them to enhance our plans?
- Are we considering scaling back any benefit plan entitlements that we extended at the onset of the crisis?
- How can we leverage analytics to better tailor our benefit offerings to our employee needs and manage costs?
- How can we re-imagine our offerings to provide our employees with the greatest degree of flexibility?

#### Well-being and mental health

- Is our current mental health support comprehensive enough?
- Can employees access new government programs to support their mental health?
- Are we adequately equipping our leaders and managers with the resources they need to support the overall well-being of themselves and their teams?
- What support are we providing to people who have experienced deaths of family members, coworkers, or clients?
- Do we need to consider additional mental-health supports upon re-entry into the workplace?
- Do we need crisis response support in place for issues involving mental health concerns in our workforce?
- Do we need to enhance our absenteeism management processes/systems?
- How can we address rapid changes in work norms (e.g., email volume, long hours) to support mental health?
- Should we conduct a comprehensive review of our mental health policies, programs, and practices?

#### Work arrangements

- Do we want to consider implementing new work-from-home incentives to minimise risks associated with re-entry?
- Should we consider modifying benefit entitlements for those who opt into modified work arrangements?
- How are we supporting our workforce, in the event of additional school or care-giving disruptions?

#### Compensation

- What concerns have our employees raised about compensation programs? Have we sufficiently addressed these?
- Are temporary compensation adjustments needed for essential staff (e.g. danger pay)?
- What is the current total cost of our workforce (on/off balance sheet workers, direct costs, indirect costs)? What levers do we have to reduce costs over the short, medium and long-term?
- How and when will we make decisions to consider adjusting our bonus and equity-based programs metrics and payouts?
- Do our executive compensation program metrics need to be reviewed?
- Will we need to evaluate salary increases for the coming year?
- Do our compensation principles need to be re-imagined (e.g. flexible compensation models)?



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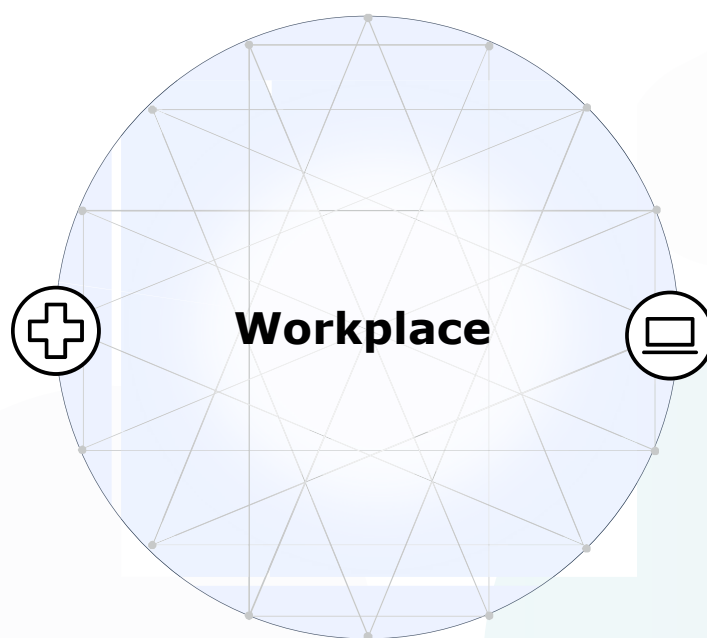
# Workplace



# Workforce:

## *Overview of key areas to be assessed*

What did we learn about working in the flow of life?  
How did it impact work when the boundaries between work and life are blurred?



### Health and Safety

When the workforce re-enters the physical workplace, strong health and safety protocols will be crucial for prevention and containment of spikes.



### Workspaces

How organisations use their workspaces will undoubtedly need to change, to ensure heightened safety, and the right balance between virtual and non-virtual interactions.

## CHAPTER 1:

# Paperwork, Hardware & Company Swag

One of the most dreaded parts of starting a new role is the hoards of paperwork that new hires are required to sign and return. We expect many businesses have already graduated to digital paperwork, but if not, we recommend using a platform to collect all of this information in one place (like Gusto).

You can also send out paperwork digitally using tools like DocuSign or DocHub, but be sure to send them well in advance of your new hires' start dates. Besides your I-9, this paperwork could also include an employee handbook, code of conduct, or any references you have on company vernacular.

- This is a great article from Tech Inclusion explaining [how to write a strong code of conduct](#).
- We like [this video shown to new hires by Atlassian](#), conveying Atlassian's background, mission, and values.

Mail out hardware (like company laptops, a wireless mouse, etc.) and confirm that all technology is in working order well before the first week. This is also a great opportunity to send out company swag.

This [guide](#) from Impact is loaded with ideas for putting a welcome pack together.

Ensuring that video chat technology is in working order will be crucial at this stage. Poor connectivity, or problems with sound can massively impact productivity and make for an awkward conversation. An IT support session is often the best second meeting to schedule, following a warm welcome. Make sure your new hire knows who to turn to if they need technology troubleshooting at short notice.

The onboarding process is an essential time to demonstrate your company culture and communicate your values and mission. Look at your new hire's first day as an opportunity to prove that your business is everything you promised them and more during the recruitment process.

*Companies with strong onboarding processes improve new hire retention by 82%.*

*(Glassdoor, 2015)*



**Tiffany Suazo**  
Human Resources, Patch Homes

At patch homes, on a new hire's first day, i have a 30 minute to 1 hour video call with them to make sure they have everything they need to succeed. After the call i introduce them to the team via slack. We also do a company-wide check-in every wednesday where they will introduce themselves in-person.

## CHAPTER 2:

# Immersion into Company culture



First impressions matter. Research shows that employees who have a negative onboarding experience are less likely to recommend your company. Conversely, 69% of employees are more likely to stay with a company for three years if they have a great onboarding experience.

A great way to help new remote hires feel like they are a part of the team is to create opportunities for them to connect with the rest of the company.

A halt on in-person activity doesn't have to mean a halt in socialization. In fact, being intentional about creating opportunities for remote social engagement is a key part of maintaining and strengthening company culture. If your workplace typically has weekly lunches, consider sending lunches through a delivery service. For example, send employees tacos for Taco Tuesday or bagels for bagel Wednesday (a Robert Walters San Francisco tradition).

## CHAPTER 3:

# Overcommunicate using the appropriate channels

Most businesses have several communication channels each serving a different purpose: [Email](#), [Slack](#), [JIRA](#), [Asana](#), [Zoom](#), [Skype](#), etc. Having a short guide explaining how each channel should be used is helpful in the onboarding process. Be sure to add your new team member to all relevant Slack channels, and communicate which channels should be used for team communication and which can be used for all other interaction (memes, water cooler chat, news stories).

We like this channel guide example from [The Complete Remote-Work Playbook](#) by our friends at [LifeLabs Learning](#):

TOOL	PRIMARY USE	NORM
Email	For non-urgent requests	Respond within 24 hours
Phone	For urgent requests	Use only in emergencies
Text	Use if call sent to voicemail	Response time within 1 hour
Slack	For learning and connection	All channels are open and optional

Establishing communication best practices upfront is another step that will put your new remote employee on track for success. Two things you can do is set up recurring one-on-ones with clear agenda items and questions and, in larger meetings, give everyone a chance to speak and share without interruption. When people speak at the beginning of a meeting, they are more likely to be engaged and participate throughout the meeting. Range uses a “spinner” at the beginning of a meeting and asks everyone to do a short check in. Take advantage of screen sharing tools (Zoom is great) to highlight new processes and demonstrate how to use team programs. People are able to track progress and stay in sync without having to book meetings all the time. Communicate key objectives to your new hire, providing them with an initial project so they can hit the ground running. Having clear expectations is a great way to help your new team member feel like they’re contributing in a meaningful way.

Don’t forget that the onboarding process extends far beyond the first month, and even the first several months. Ask your new hire to set up their own 30-day, 60-day, and 90-day plan for success so that everyone is on the same page.



**Joe Totten**  
VP Sales at Gem

We are currently having new hires schedule 1:1s via zoom with team members across the company— a sort of virtual coffee chat. We're also trying a new platform called tandem to facilitate the feeling of being in an office among teammates.



**Tiffany Suazo**  
Human Resources, Patch Homes

At patch homes, we use slack and have created a few new channels like #hello. People post here when they are starting their day, going on a break, going to lunch, and when they are ending their day. We also have a #helpdesk channel where people can post if they are having an issue, and either myself or one of the engineers will step in to help.

***Of those who don't hit their first performance goals, 50% did not have a formal onboarding process.***

*(Urbanbound, 2018)*

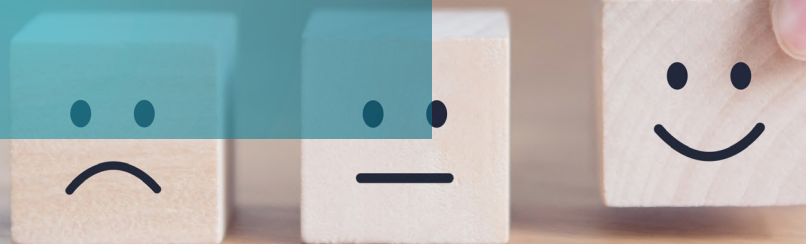


**Nicholas Walsh**  
Chief Marketing Officer, Range

Ask team members to share a written daily check-in first thing to let folks share what they're planning to do that day. Asynchronous written updates are better than video/phone because you can add links and look back on what's happened.

## CHAPTER 4:

# Be open to feedback



Unsure if your new hire is equipped with all the tools and resources they need to start the ball rolling? You won't know if you don't ask. Ask new team members for a tour of their remote work space. Environment and ergonomics are critical to performance and well being, and many will need specific support in how to best set up their home workspace. They may be in need of an extra monitor, an ergonomic mouse, or noise cancelling headphones. Some remote workers may not have a physical desk, working instead at their dining room table or couch. If your company doesn't have guidance on ergonomics, look to resources on YouTube. Offering what you can to make them comfortable will help boost productivity and morale.

Give new hires the opportunity to provide feedback anonymously, as well. Lattice is a commonly used tool, as well as Leo, a bot that can be connected through Slack to collect anonymous feedback and get a pulse for how your team is feeling.

At the end of the onboarding process, be sure to ask your new team member what can be improved. Perhaps they could have benefited from a more organized system, or would have appreciated fewer meetings and more down time to get settled in. It's important to take into consideration how different personality types may react to a novel situation, and you won't be able to improve your process if you don't ask.

*“The most effective people and teams rarely “get it right” from the beginning. The secret to finding the right communication frequency and format is to keep learning and iterating. So, set a reminder for yourself to pull for feedback at least once a week. Ask your manager and collaborators: “What is something you wish I or we did differently? What could I do 10% better? What’s working well?”*

*The Complete Remote-Work Playbook, LifeLabs Learning*

# What is Remote Onboarding?

Remote onboarding is the digitisation of the offer management, welcome and induction of new employees and contractors.

## New joiner onboarding typically includes:



## Utilising your current tech stack

PROCESS	CURRENT TECH	FEATURE
Contract management	 <small>a Dropbox Company</small>	E-signature
Welcome pack		Content distribution
Welcome videos		Private and hidden bespoke welcome videos
121's & Mentoring		Video conferencing
Meeting Scheduling		Smart self-scheduling
Team collaboration		Channels (group chat) 121 messaging
Wellness & Perks		Remote health services on demand





## *Conclusion: Strengthening your business*

During this uncertain time, as everything shifts around us, it's important to retain a sense of normalcy and routine. If your business is not typically remote, then having this opportunity to test out remote working and remote onboarding is a great learning opportunity that can make your business stronger in the long run. Remote practices are often just good practices, from how to best run meetings, to clarifying practices through comprehensive, accessible documentation. Remote onboarding certainly has its unique challenges, but by leveraging the right tools, you can ensure your newest team members find cohesion within their new teams.



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# Best Practices

## Prepare the 'Welcome' Package

# 1

Consider setting up a FAQ list that outlines your onboarding process, supplementary reading materials like a company culture guide, company history, etc. If you have any company merchandise, mail those out ahead of time so they receive it on their first day. Include a "Useful information" document with:

- Introduction to tools and software they'll be using
- Login, passwords, security information
- Training schedule and topics
- List of employees and contact directory
- "Welcome to the team" email - Include paperwork to fill out (e.g., tax, payroll & insurance forms) and communicate what to expect during their first week

## Send Them IT Hardware & Manuals

# 2

Order computers and other hardware remote workers need well ahead of their start date. Confirm they have received all necessary equipment for their work and ask your IT department to assist them with setup, if necessary. Make sure new remote workers have the following to get started:

- Laptop
- Mouse
- Keyboard

## Organise Face-to-Face Time

# 3

Set up a video call or if your company prefers to bring the new recruit in person for a day, make sure there is time to connect face-to-face.

## Share company history and values

4

This might have been already discussed during the interview process, but recapping your company history, culture, goals, structure and values will communicate expectations and context from the get-go. Share your milestones and the reasons why it is exciting to work for your company.

## Communicate Expectations

5

- **Communication methods and styles** - What information should be communicated and how, using the different softwares agreed by the company (Company email / Group messaging tool / Video conference software / Webphone application)
- **Working hours and time zones** - Be transparent about expected working hours and communicate your expectations around how to best work across various time zones.
- **Meetings** - Whichever types of meetings your company prefers (stand-ups, sit-downs, formal, casual, daily, weekly...), share these best practices with your new recruit so they can prepare for future meetings.
- **Main Business goals & projections** - What is your company currently focused on and where is it heading? Match your company's overall goals with their work so they have the information required to perform to the best of their abilities.
- **Projects, workflow and priorities** - What current projects are in place and how do they tie in with their job? What tasks and projects do you want them to start with? Are there deadlines they should be aware of? How will their progress be evaluated?

## Introduce the New Member to the Team

6

If meeting in person isn't an option, ensure to set up a team video chat with your new recruit to welcome them to the team. Also, if your company has a "Buddy" system, make sure to pair them with an installed employee who will support and mentor them in their first steps in the company. During their first days, remote employees should be setup for video chats with:

- Their co-workers
- Their manager and direct reports
- Employees from other departments they'll work closely with

## Create Training Steps and Goals

7

The first few weeks at a new job can be likened to going back to school. The brain is on overdrive from storing all sorts of new information and it can be exhausting. Breaking down the training into small steps should help reduce the overwhelming feeling of not being able to catch up with the team.

Asking new recruits to do too much, too soon is a common mistake. Instead, assign them with a series of smaller tasks and ask them to check-in with you once they have completed them. This allows you to assess their understanding before throwing something “bigger” at them. As the training advances, begin providing them with “real” work with short deadlines so you can give detailed feedback.

## Prompt hiring managers to set specific goals & expectations

8

Remote workers should not wait until their manager is online to learn what their next tasks are. Make sure hiring managers:

- Develop and share a task calendar after new hires’ training and onboarding sessions
- Define short-term and long-term goals
- Schedule weekly one-on-one meetings to discuss upcoming projects, progress and resolve potential issues

## Adapt the Length of your Onboarding Process

9

In most non-remote environments, most companies allocate one week for their onboarding. Only 37% of companies extend their onboarding programs beyond the first month. However, research suggests companies should extend their onboarding length to one year in order to increase employee retention.

Test various timelines to find what works for your organisation. A sure thing is that rushing people through paperwork and training, so they can begin doing their work sooner may not be the best path towards employee happiness, productivity and contribution.

During the first few weeks, check in with your new recruit by email or video call on a daily basis. Schedule Q&A sessions on their first day, end of the first and second week so they feel assured they have designated time and space to ask questions without interrupting your flow.



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During the COVID-19 pandemic, many companies are faced with a new hurdle: how can they successfully continue to onboard new employees during a remote phase of work? This resource was put together to help organizations navigate the changes facing their companies, and to achieve success when onboarding employees remotely.

In times of remote work, communication and face-to-face interaction is more important than ever. When it comes to onboarding new employees, it is essential that companies try to replicate their normal procedures as closely as possible.

## Remote Onboarding: *A Timeline of Events*

Below is a timeline of the elements we will cover in our Onboarding Remotely 101 guide. Use this visual as a guide to start planning for onboarding your remote employees before their first day.

### 1 WEEK PRIOR TO START

- Legal Documents
- Send Welcome Kit
- HR Initial Call
- Manager Initial Call

### DAY 1

- Technology Training
- Kickoff Calls with manager and HR

### DAY 2

- HR Training
- Team Training
- Shadowing

### DAY 3

- Introduction to Company
- Culture orientation

### WEEK 2

- Training
- Virtual Buddies

### WEEK 3

- 30-Day Review

# Remote Onboarding:

## HR Onboarding

### Documents

If possible, ask new employees to complete initial Human Resources paperwork (Offer Letters, Benefits, Non-Compete Agreements, Work From Home Agreements) when they return their acceptance letter. This could minimize delays and will be less to worry about on their first day.

- Send all necessary tax forms to the remote employee
- Send any necessary technology to the remote employee one week in advance, as well as the necessary agreement forms related to the equipment
- Be sure to discuss expectations, such as work hours and company dress code policies beforehand, to avoid issues on their first day of remote work

### Kickoff Video Call

Set up a video call with the new hire to walk them through their first day prior to their start. Discuss start time, schedule and any other pertinent details, including technologies and software they'll be using.

### Cultural Onboarding

Any cultural norms that the company follows should be addressed with the new employee as soon as possible to allow them to fully participate and get involved. Be sure to give the remote employee a platform to introduce themselves to the team or to the company – whether it be at a virtual company-wide meeting or in an email. This will allow them to feel part of the community and will encourage others outside of their team to reach out to introduce themselves.

If your typical practice is to introduce new hires to the leadership team – follow through with that promise virtually! Set-up opportunities for them to meet in a video call and connect face-to-face. HR professionals could also schedule 1:1 casual lunches or coffee meetings for the remote employee with co-workers to help them acclimate.

### Reviews

Stick to your normal schedule of reviews – if you typically hold 30, 60 or 90-day reviews, schedule those video meetings ahead of time with your remote trainees. Be sure to address how performance will be measured and consider how their performance could be impacted by the remote nature of their position.

### Welcome Kit

Consider sending new hires a welcome kit prior to their first day of remote work. This kit could be sent with any culture promotional materials (see here for our Guide to Working From Home), company swag and necessary technology equipment and instructions (for an example, see our Sample Technology Setup Guide) Additionally, materials such as pens, post its, notepads, an organizational chart, or weekly schedule can go a long way in making them feel welcome. Employees will remember their remote onboarding experience and are more likely to recommend a company who clearly went out of their way to make them feel welcome.

# Remote Onboarding:

## *Team Onboarding*

### Kickoff Meeting with Manager

Keeping face-to-face interactions is crucial to the successful integration of your remote new hire. Managers should reach out to their remote new hires prior to their first day to ensure they are set up for success when they begin.

#### 1:1s

Frequent communications between employee and manager is especially important when they are remote. Take the time to schedule weekly (or daily if needed in the beginning) video meetings with the employee to touch base on their onboarding and current projects.

#### Schedule

Giving your employee a schedule for the first several weeks of their onboarding serves the dual purpose of setting work expectations and holding them accountable to the work they are producing. Be sure to include breaks in the schedule throughout the day.

#### Shadowing and Learning

The remote nature of a new hire could make it harder for them to learn tasks that might be easier to learn in-person. For this reason, consider having them shadow projects by having a more seasoned employee share their screen to ensure they fully understand projects before jumping in. This also allows them the opportunity to ask questions beforehand.

### First Day

On their first day, Managers should lead the new hires through the function of their team, and the role of each member. This conversation will include an overview of the employee's role, the role of the team to the company, communication expectations and a layout of their first week.

After they begin, consider setting up virtual coffees, happy hours, or team lunches. Since there is no one sitting next to them every day, it is easy for the remote hires to feel isolated. Organizing regular interactions will help them meet the team and feel in the loop.

#### Communications

It is significantly harder to distinguish non-verbal cues or body language virtually, and because of this communication becomes more challenging. Set firm expectations around communication regarding priorities for the day, daily recap emails, addressing roadblocks, etc.



# Remote Onboarding: *Training*

TRAINING

## Tech Training

Remote employees should begin their onboarding with the IT department to ensure all their technology is functioning properly. They should have received the equipment and set-up instructions well in advance to prevent any issues on the first day. IT can then lead them through the basic functions of the communication platforms and video conferencing software that will be the basis of their training (see here for our Sample Technology Setup Guide).

## Video Office Tours

If your remote employees won't be visiting your office(s) for a while, considering filming an office tour! Film a walking-tour of the office, so they can have a visual of what working there day-to-day might look like. Additional info could include the best lunch spots in the area, proximity to public transport, and different activities to do after work for when they begin at the office.

## Virtual Buddies & Mentor Programs

Pair the remote employee with a co-worker! This can be someone they can go to for answers to questions about the workplace that is separate from those they interact with every day.

## Virtual Start Classes

Have an entire training class starting soon? Train them virtually! Pre-record segments that occur frequently, or host classes live. Partner with your HR team and combine them with interactive sessions to provide variety in your sessions. By giving the classmates the opportunity to meet and interact with each other, they are creating a mini-community within the company who they can rely on in future.

# 5 Tips for Onboarding Employees Remotely During the Coronavirus Pandemic

Brought to you by the insurance professionals at Neckerman Insurance Services

## Why Is Onboarding Important?

A study published in the Academy of Management Journal found that the first 90 days of employment is a pivotal time period for employees to build rapport with a company, its management and their co-workers. When you share your company's goals and values with your employees while simultaneously showing them how to do their jobs, everyone benefits.

## Best Practices for Remote Onboarding

If you have new hires who need to be onboarded remotely during the pandemic, keep the following best practices in mind:

- 1- Meet with them in-person on their first day, if possible.** If your local laws allow for it, try to meet with new hires at the office to welcome them to the company, get them set up with any necessary equipment and deliver any printed training materials. Be sure to test the equipment to make sure it works before you both leave the office. Keep social distancing guidelines in mind when meeting with new hires, which include keeping a 6-foot distance at all times. While it may seem odd, avoid shaking hands to prevent the spread of COVID-19.
- 2- Set clear expectations with new hires.** One of the most common mistakes employers make with onboarding plans is not setting clear expectations. Because your onboarding process is now being done remotely and you're not there in-person to monitor a new hire's progress, setting expectations becomes even more important. Expectations that should be discussed include the company's values, the team's objectives and the new hire's responsibilities.
- 3- Don't overwhelm new hires with too much training.** Training new hires remotely isn't ideal for managers or the new employee. As such, prioritize the training and only train new hires on the skills that are absolutely essential for them to be able to do their job. Overwhelming new employees with too much information at once when they're working from home can lead to confusion, stress and frustration.
- 4- Check in with new hires daily.** Having employees work from home can help keep them healthy, but it can become isolating, especially for new hires. Schedule a daily call or video chat to help new hires feel like part of the team and give them the opportunity to ask questions.
- 5- Match a new hire with a remote mentor.** Assigning mentors to new hires can be highly advantageous to both parties. It gives new hires someone to contact for questions and helps mentors develop confidence and pride in their jobs. Encourage mentors to have daily check-ins with new hires to establish a professional relationship and help the new hires feel included.



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**CEO succession:**  
*Managing a successful  
outcome — virtually*





## CEO succession:

### *Managing a successful outcome — virtually*

As a consequence of the coronavirus situation, meetings, interviews, workshops — even general assemblies — are being managed online via conference calls or video technologies. Globally, business leaders are navigating an unprecedented crisis and hour-by-hour changing the way their organizations operate to cope with uncertainty, risk, restrictions and lock downs. At the same time, they are preparing their top teams and stakeholders for a new reality — a world in which the need for visionary leadership is greater than ever. Where strategies are turned upside down, where innovation and sustainability focus are prerequisites, and where the modus for collaboration is redefined, internally, externally, locally and globally.

In the midst of the turmoil, a key question for chairmen, CEOs, nomination committees and CHROs is how to keep pace with — if not accelerate — executive succession practices and ensure timely completion. As transboundary as it may seem, a new standard for virtually delivered top-talent succession is evolving. Preferably not replacing face-to-face meetings and interviewing,

a fully digital succession process — where clients and candidates meet, assess and negotiate through video “hangouts and meets” — should be considered a real and necessary alternative. Boards should not be too concerned about making a leadership decision virtually when the new CEO may have to lead the company in a virtual environment.

As we observe and learn from the evolving situation, here are some recommendations for how to manage increasingly virtual board and C-level succession processes with a successful outcome. Certain foundational principles should be observed, regardless of circumstances:

- A future role specification aligned with the board's expectations
- A stringent research strategy
- Thorough assessment of internal and external talent
- High-quality, comprehensive material about candidates

# The following five steps will help you manage C-level succession in a digital environment:

## PROVIDING YOUR LEADERSHIP CONSULTANT WITH DETAILED CONTEXTUAL INFORMATION

To be fully effective, your leadership consultants need a clear understanding of the business context and the resulting leadership implications. This means ensuring that they have good visibility into your organization, for example the current strategy; the aspirations of the company going forward, including potential changes to current strategy; the strengths and weaknesses of the management team and their respective leadership styles; the dynamics between the board and management; and the company's market and competitive position. The more insights the leadership consultants can take away from upfront discussions with members of the board and management team, the better the outcome.

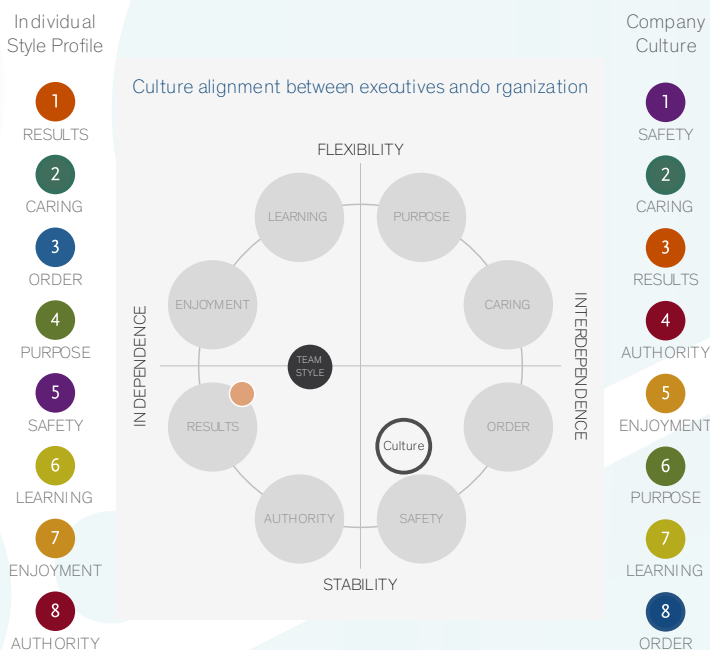
## PLANNING AN INCLUSIVE, SEAMLESS PROCESS

Designing a robust time plan upfront — involving key constituents — has always been critical. While technology offers more flexibility and can speed up processes, the inevitable virtual distance puts great demands on the phasing of interviews. It is important to allow all members of a nomination team to spend sufficient time with the finalist candidates, preferably designating specific roles for individual interviewers to probe on different dimensions. This is virgin ground for candidates too. In order to comfortably accept an offer following a true virtual hiring process, candidates require interactivity and accessibility throughout.

## IDENTIFYING CULTURAL IMPACT

Research by Spencer Stuart and other industry experts indicates that assessing the likely cultural impact of a candidate is a key aspect of any board or C-level succession.<sup>1</sup> Of course, before a candidate's cultural alignment can be assessed it is imperative to define and articulate the organization's culture — its values, goals and practices. In situations where this is not practically possible, then as a minimum it is vital to articulate the culture of the team that the candidate will join (e.g. executive management, board of directors).

Boards are increasingly interested in a CEO candidate's engagement scores. It helps to understand how a candidate's leadership style will engage the organization so that it can align around a plan for the current crisis and whatever new strategy may emerge for dealing with the post-crisis world.



# *The following five steps will help you manage C-level succession in a digital environment:*

## PROBING VALUES, MOTIVES AND STRESS FACTORS

In best-practice processes, finalist candidates are thoroughly referenced. Their career history and experience are scrutinized and their leadership capabilities carefully assessed. This is often supplemented with selected psychometric profiling. Take the opportunity of adding new or additional psychometric data points to further identify areas to probe and increase consistency. Our longstanding relationships with candidates fuel insight-ful referencing. Deeper, richer references become all the more important in a virtual world.

## PREDICTING EXECUTIVE POTENTIAL

The ability to predict leadership potential is crucial and needs to be fully integrated into the CEO succession process. For a nomination committee, understanding the executive intelligence and learning agility of the finalist candidate is probably the most important factor in making a final decision. In a process limited to calls and video meetings, we recommend broadening the use of executive potential measures for both internal and external candidates in all C-level successions and other business-critical hires. Our case-based ExI® assessment tool is uniquely positioned to determine executive potential.

# References:

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[deloitte-uk-covid-work-workforce-and-workplace-key-considerations](#)

**Executive Connections:**

[Remote-Onboarding-Guide](#)

**LaSalle Network**

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[Tips-for-Onboarding-Employees-Remotely-During-the-Coronavirus-Pandemic](#)

**SpencerStuart**