How to Successfully Interview & Onboard Employees Remotely
Today's ALTA Insights
Featured Sponsor

Qualia
Meet the Panel of Experts

- Donna Anderson | AVP, Agency Development Manager | NATIC
- Jennifer Luedtke | Human Resources Manager | Town n’ Country Title
Remote Interviewing & Onboarding

• Remote recruiting for new employees
  • online job posting & referrals
  • phone and video interviews versus in-person
• Personality Testing
• Identifying your onboarding team
• Onboarding your new hires from their home
  • Timeline of setup & the first 90 days of employment
• Developing community & engagement
Where do I post my open jobs?

• Online Job Search Engines
  • Indeed
  • Monster
  • ZipRecruiter
  • State specific Workforce Development Sites

• Social Media Platforms
  • LinkedIn
  • Facebook

• Company website
  • Careers page

• Referrals!
  • Your employees know your company best & what it takes to be successful! Promote referrals (with a $$ bonus!)
Remote Interviewing

• Start with a Phone Interview
  • Set time aside on the calendar to connect via phone call
    • Ask basic interview questions & gather basic communication skills

• Video Interviews versus In-person Interviews
  • Go-To Meeting
  • Zoom
  • Microsoft Teams

• Personality Testing
  • DiSC
  • Acumax
  • Predictive Index
  • Enneagram
Video Interviews

• Connect your Hiring Team via video platform
• Be personable & SMILE!
  • Make the applicant feel comfortable and relaxed – watching themselves on screen can be just as stressful as in-person!
• 5 Do’s & Don’ts
  • Test your tech
  • Set the scene
  • Have an agenda/interview questions
  • Be mindful
  • Showcase your company
Onboarding Your Employees Remotely

• You’ve been hired, now what?
  • Topics to be covered
    ✓ Teamwork in onboarding
    ✓ A timeline checklist
    ✓ A Day 1 experience
    ✓ What happens the first 90 days
    ✓ Developing community when working remotely
    ✓ Retention and engagement
Onboarding Your Employees Remotely

• Who is your team?
  ✓ Trainers
  ✓ Marketing
  ✓ Managers
  ✓ Peers
  ✓ HR
  ✓ Outside sources
Onboarding Your Employees Remotely

• What is your timeline?
  ✓ Things you can do before start date
  ✓ A Day 1 experience
  ✓ Example of a timeline
  ✓ Possible programs to use
    ✓ Asana
    ✓ Excel
<table>
<thead>
<tr>
<th>Color Coded</th>
<th>New Employee Onboard Process</th>
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<tbody>
<tr>
<td>Marketing</td>
<td></td>
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<tr>
<td>HR and/or IT</td>
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<tr>
<td>OnBoard Specialist</td>
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<td>Regional Manager</td>
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<td>Hiring Manager</td>
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<td>New Team Member</td>
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<table>
<thead>
<tr>
<th>Before/After Start</th>
<th>Task</th>
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<tr>
<td>Day -21</td>
<td>Prepare Database in CRM for new employee</td>
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<tr>
<td>Day -21</td>
<td>Offer letter sent with Background check link after getting from hiring manager: area code for phone, Title, connector office address, and comments from Regional Manager for press release</td>
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<tr>
<td>Day -21</td>
<td>Offer Letter Signed -background initiated. Include in email to schedule headshot appointment so that when background clears they are good to go. Include the photo requirements</td>
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<tr>
<td>Day -21</td>
<td>Reach out to new hire with headshot requirements and note to send to Marketing</td>
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<tr>
<td>Day -14</td>
<td>Background check clears</td>
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<td>Computer, Monitors, Printer/Scanner, Docking station, iPhone</td>
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<td>Iphone with area code information to be requested from IT</td>
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<tr>
<td>Day -14</td>
<td>Send new hire welcome kit form, headshot, resume and Regional Manager comments for press release to marketing</td>
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<tr>
<td>Day</td>
<td>Activity</td>
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<td>Day -3</td>
<td>Regional Manager sends welcome letter to new hire and spouse if one exists along with a gift</td>
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<td>Day -2</td>
<td>1: Send the initial books to read to new Team Member&lt;br&gt;2: Head shot sent to marketing&lt;br&gt;3: Photo uploaded to internal company page</td>
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<td>Day -1</td>
<td>On Boarding Kit Ships: Marketing supplies sent: Pens, notepads, thank you cards, etc.</td>
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<td><strong>New Team Member STARTS AT NATIC</strong></td>
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<td>Day 1</td>
<td>Regional Manager sends email to all NATIC associates using the BCC: for the emails</td>
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<td>1: On Board specialists Schedules first training session on calendar&lt;br&gt;2: Email from marketing with &quot;who's who&quot; at NATIC to new team member</td>
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<td><strong>Computer setup</strong>&lt;br&gt;Do You Know Template Available with new New Team Member introductory message&lt;br&gt;New Team MemberS Map Updated and Distributed&lt;br&gt;New Team MemberS Profile Flyer Updated and Distributed&lt;br&gt;Update States we are licensed page and Contact us page on Agentlink to add New Team&lt;br&gt;Personal Web Page goes live</td>
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<td>Days 3 and 4</td>
<td><strong>Online Sessions for training begin with Onboarding Specialist who reviews all software platforms</strong>&lt;br&gt;Setup calls with Director of Operations, UW, Auditor, PResident, Compliance, Claims and ADMIN</td>
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<td>Day 5 or 6</td>
<td>Marketing: New Team Member website access and review&lt;br&gt;Title presentation video&lt;br&gt;Department call invite for Marketing/Education&lt;br&gt;Press release sent (PR, bio and PWP sent to new New Team Member)&lt;br&gt;Prospects set up in CRM so that the press release can be sent on Day 7 (top 5 metros, Top 5 prospects each metro)</td>
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Developing Community Remotely

• Tools you can use?
  ✓ There are lots of books available
  ✓ In the Book “Onboarding” by Dr. Gia Suggs it is mentioned that employees who do not make real ‘connection’ in their first 6 months are more likely to leave
  ✓ MS Teams, Skype, Zoom, etc
  ✓ Team Projects
  ✓ Weekly calls, check ins, motivational texts or notes
Retention & Engagement

• How do you keep them engaged?
  ✓ Develop relationships
  ✓ Use the methods on last slide
  ✓ Work to eliminate the “I feel like I am on an island” statements
  ✓ Accountability without micro-management
ALTA Resources

• Sample Behavioral Interviewing Questions
• Sample Job Descriptions & Advertisements
• New Hire Checklist

https://www.alta.org/human-resources/
Questions?