ALTA inSIGHTS

REAL TIME | ON-DEMAND

How to Successfully Interview & Onboard Employees Remotely

Donna Anderson| NATIC

Jennifer Luedtke| Town n' Country Title

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

Sample Onboard Timeline

New Employee Onboard Process

Color Coded

| Marketing |
| HR and/or IT |
| OnBoard Specialist |
| Regional Manager |
| Hiring Manager |
| New Team Member |

Before/After Start	Task
Day -21	Prepare Database in CRM for new employee
Day -21	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
Day -21	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
Day -21	Reach out to new hire with headshot requirements and note to send to Marketing
Day -14	Background check clears
	Computer, Monitors, Printer/Scanner, Docking station, iPhone
	Iphone with area code information to be requested from IT
Day -14	Send new hire welcome kit form, headshot, resume and Regional Manager comments for press release to marketing

Sheet1

Sample Onboard Timeline

	A	B
38	*Day -3*	Regional Manager sends welcome letter to new hire and spouse if one exists along with a gift
39	*Day -2*	Send the initial books to read to new Team Member
40		Head shot sent to marketing
41		Photo uploaded to internal company page
42	*Day -1*	**On Boarding Kit Ships**: Marketing supplies sent: Pens, notepads, thank you cards, etc.
43	*New Team Member STARTS AT NATIC*	
44		
45	*Day 1*	Regional Manager sends welcome email to all NATIC associates using the BCC: for the emails
46		On Board specialists Schedules first training session on calendar
47		Email from marketing with "who's who" at NATIC to new team member
48		Computer setup
49		Did You Know Template Available with new New Team Member introductory message
50		New Team MemberS Map Updated and Distributed
51		New Team MemberS Profile Flyer Updated and Distributed
52		Update States we are licensed page and Contact us page on Agentlink to add New Team
53		Personal Web Page goes live
54	*Days 3 and 4*	Inter Company training videos watched
55		**Online Sessions for training begin with Onboarding Specialist who reviews all software platform**
56		Setup calls with Director of Operations, UW, Auditor, PResident, Compliance, Claims and ADMIN
57		
58	*Day 5 or 6*	Marketing- New Team Member website access and review
59		Title presentation video
60		Department call invite for Marketing/Education
61		Press release sent (PR, bio and PWP sent to new New Team Member)
62		Prospects set up in CRM so that the press release can be sent on Day 7 (top 5 metros, Top 5 prospects each metro)
63		

Sheet1

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?