An SMB's Guide to Recruiting and Onboarding in a Virtual World

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Even before 2020, remote work, flexible hours and an emphasis on a more diverse workforce had begun to alter recruiting and onboarding for small and medium-size businesses (SMBs). The COVID-19 pandemic and 2020's racial turmoil accelerated these changes. As the economy recovers, SMBs must adapt if they hope to attract and retain the best and the brightest in their industry.

This eGuide outlines best practices for recruiting and onboarding a qualified and diverse workforce in a virtual world. Additional resources are available through TriNet.

Recruiting

As many companies place less emphasis on where people work, SMBs may find they have access to a larger and more diverse talent pool to enhance their competitive edge. Better still, the virtual environment supplies hiring managers with additional tools to attract talent. Success depends on a disciplined and strategic approach.

STEP ONE: DEFINE THE JOB AND THE SKILLS IT REQUIRES

Any job description should at least include the following:

- **Specific work** that needs to be done
- **How the job will be classified** (e.g., part-time, full-time, temp, freelance, contract-to-hire, intern, co-op, job share or other)
- **Essential skills**, education and experience needed to complete the work
    - In today's environment, the job description might also include a demonstrated ability to successfully work remotely and with a diverse team of co-workers
- **Success measures**

- **Compensation level**
  - Be aware that certain states require salary ranges or pay bands to be disclosed at varying stages of the recruiting process and under varying conditions; this is especially important to consider when you are recruiting people to work remotely
  - Be aware too that the pay scales for remote work have become more complicated as such work has expanded—salary scales appropriate for in-person work in one region or more traditionally remote jobs may change as more jobs include a remote work option. You may have to adapt your HR system to accommodate these changes

STEP TWO: CONDUCT SMART, TARGETED OUTREACH

Create a concise, accurate well-written job listing. In addition to the job description outlined above, the listing should be reviewed for legal and regulatory compliance and also might:

- **Convey your company's culture** to candidates, including:
  - An employee value proposition that emphasizes why your company is a great place to work
  - Your company's mission or purpose—as an example, consider TriNet's mission and vision in the callout box below
- **Provide a high-level overview of company benefits**, especially those that might be exceptional
- Describe any required pre-employment tests, if allowed and appropriate for the locality and position
- State directly that you are an equal opportunity employer
- Clarify whether you are prepared to sponsor a visa or not

> At TriNet, our mission is to power business success with extraordinary HR. We rally around a shared vision of improving humanity through business growth and innovation.

Place the listing on your company's career page and appropriate job boards (e.g., LinkedIn®, Indeed®, Monster®) where your postings have been most effective in the past.

In addition, consider the following:

- **Depending on the job**, appearing at university job fairs or creating online posts at universities can be helpful
- **Encourage your employees** to refer people they know—and, if applicable, refer them to your internal job referral program
- **When seeking to diversify your workforce**, also look to industry or student associations, they can be a great source for historically marginalized or underrepresented talent, and make clear to these associations the opportunities at your company, as well as specific examples of what you've done to create an inclusive workplace culture
  - **Such outreach is most effective** if you've already created a culture within your company that diverse candidates will recognize as welcoming and inclusive

STEP THREE: SCREEN EFFECTIVELY AND WITHOUT BIAS

Before the Interview

In addition to requiring resumes and cover letters, decide who will be involved in screening candidates and whether you want to include screening questions with the application process to eliminate inappropriate candidates prior to interviews.

Consider the use of emerging artificial intelligence (AI) tools that use big data to find and match potential candidates to precise job descriptions and help meet diversity goals. However, use such tools cautiously, as some have been found to have algorithms that reflect their creators' inherent biases and, therefore, can lead to potentially discriminatory results. On the other hand, some companies have found that pre-interview screening through technology-related solutions has enabled them to better match candidates to jobs.[1]

The Interview

While many companies are trying to reduce the number of interviews and simplifying the interview process, in part by using smaller hiring panels,[2] the interview remains an essential piece of any hiring process. With that in mind, employers must decide whether they want to do their interviewing in person, via video or use a hybrid approach.

In-person interviews avert the risk of technical difficulties and many still prefer the human element, but video recruiting also has benefits, including being easier to schedule and requiring less time out of the candidate's day, both of which can expand the candidate pool.

[1] Chris Parnin, "Tech Sector Job Interviews Assess Anxiety, Not Software Skills," NC State University News, accessed March 23, 2021.
[2] Samantha McLaren, "How Hilton, Google, and More Have Dramatically Reduced Their Time to Hire," LinkedIn Talent Blog, accessed March 31, 2021.

"TriNet has changed the game in how we recruit and retain talent, has made it simpler to manage payroll and added hours back to my plate."

Ian McConville
Director of Operations
mcSquares

In addition, during the pandemic, interviewing people from their homes has, in some cases, put people more at ease, giving the hiring team a better sense of how the person will eventually fit.

Whether the interview is in person or via video, it is important to set clear expectations about the interview process for both hiring teams and the candidates themselves. Training interview teams about diversity, equity and inclusion (DEI) concerns should be part of that preparation. Anyone involved in the hiring process should understand what they can and cannot say and do to remain compliant with applicable federal, state, and local laws and company goals.

Other basic principles for good interviewing still apply:

- **Be prepared**
  - Go over each candidate's resume and application prior to their interview
  - Interviewers should have questions prepared that relate to job knowledge, skills, abilities and, perhaps, cultural fit
    - Use open-ended questions whenever possible and use the same set of initial questions for each candidate
    - Follow-up questions can vary depending on responses
  - Be clear on the evaluation criteria for excellent, , good, fair and poor answers look like so all interviewers are working from the same understanding (See Post-Interview below)
- **Put the candidate at ease**
  - After stating your name and position, spend the first two minutes in pleasant unstructured talk with candidates to break the ice and soften the impersonal side of structured interviews; keep it brief and simple and avoid evaluating candidates during this time
  - Describe the interview format so the candidate knows what to expect, including the fact that you will be taking notes and giving them an opportunity to ask questions
- **Listen, observe carefully, and take good notes**
  - Potential red flags might include the candidate not mentioning past failures, exaggeration, destructive comments about others or lack of interest in the specifics of the job
- **Leave time for the interviewee to ask their questions**
  - Remember this is a mutual evaluation, with candidates judging whether yours is a company where they want to work; therefore, be prepared to give a complete and honest description of the job and workplace culture
- **Post-Interview**
  - Consider an evaluation method that enforces consistency and objectivity among the hiring team—rating candidates' answers on a scale from 1-5, for example, can be more effective with clear, objective criteria for ranking answers poor through excellent

STEP FOUR: THE OFFER LETTER

Once you have chosen a candidate, send a standardized offer letter or email that:

- **Expresses excitement** at having the person join your organization

- **Outlines all** of the role's requirements

- **States that this is employment at will**, if applicable and allowed in the onboarding employee's field of work and jurisdiction

- **Provides another glimpse** of what it's like to work at your organization

- **Includes benefits information**, if applicable

- **Requires that applicants** demonstrate proof of eligibility to work in the U.S.

- **Requires that they sign** a Proprietary Information and Inventions agreement and any other company-specific agreements, as applicable

- **Is clear about the expectations** for remote versus in-person work, how that might change over time and how the changes would affect all aspects of the required job

- **Includes any other information required** to be provided to onboarding employees

> Organizations with a strong onboarding process improve new hire retention by 82% and productivity by over 70%.[3]

You should also maintain communication between the acceptance and onboarding to prevent losing candidates in the interim period.

Onboarding

In a study commissioned by Glassdoor, Brandon Hall Group research found that organizations with a strong onboarding process improve new hire retention by 82% and productivity by over 70%.[3] Given that the average U.S. employer spends $4,000 and 24 days to hire[4]—employees who had a negative onboarding experience are twice as likely to look for other career opportunities in the future[5]—a strong onboarding process is essential.

Yet, surprisingly few companies dedicate appropriate thought and resources to the onboarding process. Gallup has found that only 12% of employees strongly agree their organization does a great job of onboarding new employees.[6] That may be because too many organizations focus their onboarding on processes and paperwork, without giving enough thought to a strategic, people-focused plan for nurturing and retaining talent.

That matters because many new hires are either consciously or unconsciously looking for a warm welcome, a strong connection to the organization and a sense of purpose and belonging. Many also want to trust they will be treated fairly, understand how the company uses technology and collaboration tools, and be given clear goals and expectations.

[3] Madeline Laurano, "**The True Cost of a Bad Hire**," Brandon Hall Group, accessed May 5, 2021.
[4] Samantha McLaren, "**How to Calculate Cost Per Hire**," LinkedIn Talent Blog, accessed April 12, 2021.
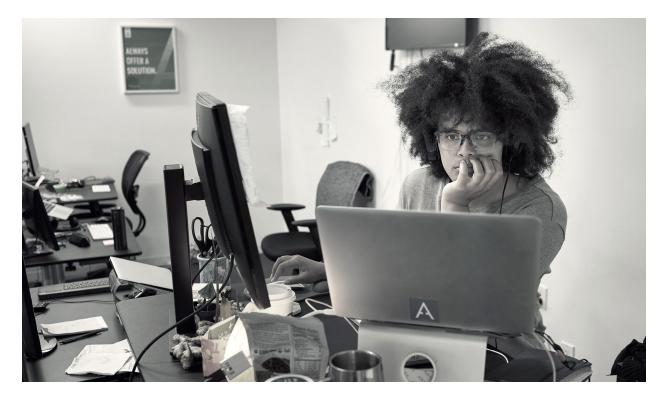[5] "**Super CIO**," Digitate, accessed March 31, 2021.
[6] Gallup, "**State of the American Workplace**," 2017.

Below are some best practices that apply to onboarding for nearly any industry.

PRIOR TO DAY ONE

- **HR should create a new personnel file** and other files as appropriate
- **Make sure your employee has completed** all necessary and required paperwork and has all necessary materials for starting on day one
- **Prepare and send the new hire** a personalized welcome note or video from leadership and co-workers
- **Plan meaningful work** for new employees to do during week one, so they feel busy and needed
- **Announce to co-workers** that new employees will be arriving
- **Prepare the workstation or send all necessary equipment** for remote work and have the new hire sign a company property or equipment form
  - Remote work might require you to be a little more proactive—you might, for example, make sure the company laptop arrives the Friday before the Monday start date, so your employee is ready to go on day one
- **Assign an onboarding mentor** from within the department, someone who can less formally familiarize the person with the operations and procedures at the company and department
  - According to a CNBC/SurveyMonkey Workplace Happiness Survey, 91% of workers who have a mentor are satisfied with their jobs—and 57% are very satisfied[7]
  - Contrast that with the more than 4 in 10 workers without a mentor who say they've considered quitting their job in the past three months[8]

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[7] Laura Wronski, "**Nine in 10 workers who have a career mentor say they are happy in their jobs**," CNBC, accessed March 23, 2021.
[8] Ibid

- **Especially if the work will be remote**, be clear about your company's expectations around important workplace routines, including but not limited to:
  - Productivity goals
  - Breaks and meals
  - Communication preferences
  - Hours of work and corresponding recording of such hours, if applicable

DAY ONE

Whether online or in person, welcoming a new employee is just as important as welcoming a new client.

- **Have your new employees' supervisor or co-worker help** them complete all relevant and required paperwork they have not already completed and review all relevant administrative procedures, performance expectations and compensation
- **Ensure the new employee understands the core business**, as well as the company and departmental culture and the history of the role the new employee has been hired to do—this can be part of a series of meetings with all relevant co-workers and supervisors
  - If the work is remote and there is a group of new employees, you might create a day one class via video that enables a round of introductions
  - These can then move into individual meetings that help new hires adjust to the social and performance aspects of their jobs
- **Especially for remote work, vary tasks** to avoid endless hours spent on video calls
- **Have one person or a group of people** from the department take the new hire to lunch
  - If the work is remote, you might schedule an informal zoom meal during lunch and have participants think ahead about how they can make the new hire feel at home

CONTINUING THROUGH DAY 90

While many organizations stop their onboarding process after the first week, doing so can leave new hires feeling confused and alone at work. In contrast, best practices indicate that employee onboarding programs should take place for at least 90 days to ensure new hires have the support they need to be productive. Many of the best onboarding programs create a program that encompasses the first year of work.

Whether 90 days or a year, both a supervisor and a mentor should have regularly scheduled meetings and check-ins to see if your new employee has questions, provide ongoing feedback and limit the risks of the new employee feeling isolated.

Find the Right People. Nurture Them Wisely.

Because your people are your company's biggest asset, it's very important that you pay close attention to how you recruit and onboard. Finding the right people and helping them realize their true potential are essential components for business success.

About TriNet

TriNet (NYSE: TNET) provides small and medium size businesses (SMBs) with full-service HR solutions tailored by industry. To free SMBs from HR complexities, TriNet offers access to human capital expertise, benefits, risk mitigation and compliance, payroll and real-time technology. From Main Street to Wall Street, TriNet empowers SMBs to focus on what matters most—growing their business.

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