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Onboarding Goes Virtual

Virtual onboarding has become more frequent in recent years — find out how to make the process more personal.

On Friday, March 19, 2020 — one business day before Danielle E. Cain was scheduled to begin working as an Associate at Spiros Law, P.C.’s Champaign, Illinois, office — the governor announced a statewide stay-at-home order to reduce the spread of COVID-19, which took effect the following day.

Without a workplace to report to on Monday, the personal injury firm delayed Cain’s start date by roughly three weeks to determine how employees would be able to work remotely — and execute their typical onboarding steps.

“It just really required intentionality — making sure I had access to everything,” says Cain, who is now a Partner at the firm. “We were extremely intentional about training, meeting with people via Zoom; we’re still very deliberate about those things today.”

Before 2020, onboarding new hires virtually wasn’t the norm, according to Jared Correia, a former practicing attorney and Founder and Chief Executive Officer of Red Cave Law Firm Consulting — and the industry’s approach to onboarding in the office, he says, wasn’t always ideal.

“Though there were some law firms using remote employees prior to the pandemic, it was a small number,” Correia says. “Attorneys have always valued in-person work and collegiality. Most law firms operate on a ‘baptism by fire’ protocol, where people are just thrown in and expected to learn on the fly, including hires with little experience.”

With all but 11% of law firms now supporting some type of hybrid work arrangement, according to a CBRE survey, virtual onboarding is presumably becoming a more frequent occurrence.

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While getting newcomers up-to-speed — and ensuring they feel like part of the team — can be a nuanced endeavor when they're standing in front of you, paying close attention to elements such as the instructional materials and interaction you provide can help increase the likelihood you'll be able to successfully manage the onboarding process online.

TECH ORIENTATION CONSIDERATIONS

Implementing remote onboarding capabilities doesn't necessarily have to involve a large expense.

Firms and legal departments are often able to use existing technology to induct employees who aren't physically in the workplace, according to Joleena Louis — whose New York-based divorce and family law firm, Joleena Louis Law, has utilized virtual part-time paralegals and assistants since 2018.

Cloud-based software platforms, for example, can let employees easily access law firm or department resources from different locations.

"Depending on how they are currently operating, they may need to invest in new technology," Louis says. "But if you already run part of your business virtually, it's likely you already have what you need."

Spiros Law outfits new employees who will be hybrid or fully remote with the type of laptop and phone firm members use in the office, as well as an extra computer screen, so everyone is using the same compatible system components.

To allow recent hires to absorb all the information that's shared during the onboarding process, the firm spreads it out over about six weeks, Cain says.

On their first day, new employees learn how to use the case management system. Within their first week, they'll attend one of the firm's all-attorney or all-assistant meetings via a videoconferencing platform and be introduced to colleagues.

The firm also, according to Cain, tries to identify opportunities for new attorneys to electronically sit in on events such as a mediation or arbitration.

"We're usually texting at the same time — [asking], 'Do you have any questions? Did you think of anything I didn't ask?'" she says. "The advances in Zoom since COVID have really allowed for including the shadowing and observations from our remote employees."

MAXIMIZING THE IMPACT OF EDUCATIONAL CONTENT

To adequately prepare new hires to perform work, Louis documents the processes with a screen recording tool, essentially creating on-demand tutorials.

"For every task that needs to be completed, I have a step-by-step process, so it is easy to show new hires how to do it," she says. "I use Loom to record [on-screen] what needs to be done and talk through each step. If new processes are developed, you can even have the employees record and explain the process for any future employees."

Various preparations can help new employees tap into the organization's institutional knowledge when they start. Cain and another Spiros Law partner, for instance, created a handbook for the firm's case management system, which they've continued to update with help from an office manager.

"You can look up pretty much anything you have a question [about] because we've been adding things to it that have come up," Cain says. "It's constantly evolving and expanding [because] we've [said], 'Oh, you know what? So-and-so doesn't know how to do this. We probably didn't onboard that.'"

The firm has also developed explanatory sessions to address specific needs.

"As time has evolved, we've added more trainings on different things we hadn't really thought of in the beginning," Cain says. "It's things as simple as acronyms that the office uses."

Other technological tools and approaches can help organizations confirm remote and hybrid hires fully comprehend the preferred operational methods.

“Regular feedback loops are effective, whether it’s daily standup meetings or access to asynchronous communication tools, like Slack,” Correia says. “And hypothetical training exercises, fact patterns related to real work experiences, can help to access a new hire’s ability.”

GETTING ACQUAINTED

With multiple teams frequently involved, onboarding can potentially be a complicated undertaking, according to Jamy Sullivan, JD, Executive Director at Robert Half — particularly if all related communication occurs by computer or phone.

“The piece of it that maybe doesn’t translate as well is that human connection,” Sullivan says. “Because you’re going to miss out on that water cooler talk and getting to know each other personally.”

In addition to having dedicated team members, such as a help desk specialist, available to handle onboarding’s technical aspects, she suggests employers ensure, by the time new employees start, a meeting has been scheduled — such as a casual chat over coffee — with their coworkers to facilitate everyone sharing information about their role, themselves and how they’ll work together.

“[You’re] setting those meetings up just to get that personal knowledge of who this person is,” Sullivan says. “That starts to evolve into understanding the company culture — and that dynamic of what you would feel if you were in the office doing your onboarding.”

She also recommends pairing new employees with a mentor, something she says law firms tend to do more often than legal departments.

“If this is a new graduate or somebody who’s coming to your firm or department with 20 years of experience, a mentorship is another piece that can be so critical to their integration,” Sullivan says. “It allows for one-on-one interaction and a better understanding of the overall culture. That sets an individual up for success — but [it’s] also a retention factor. Whether it’s remote or in-person, that should still be part of the process.”

Firms and legal departments can encourage new off-site employees to participate in social events. When the Spiros Law location in Champaign hosts a happy hour, Cain says, the gathering is broadcast to conference rooms through Zoom, and the firm tries to loop external employees in.

“Our remote people and all the offices hop on,” she says. “That way we’re all together, even though we’re not. We try to plan things like that to make sure we’re getting together. There are events that are in-person, where our remote people will come; [the assistants who live in] North Carolina and Washington don’t generally — but they’re always invited.”

FAVORING SUBSTANCE OVER PACE

During onboarding, the focus can often be on getting new employees up-to-speed on the organization’s procedures and work assignments as quickly as possible.

Taking the time, however, to outline performance expectations and any associated milestones — such as what you expect to be accomplished after 30 and 60 days — and asking new employees on a weekly basis what’s working or may be lacking could strengthen your overall training efforts, according to Sullivan.

“This gives you, as the employer, an opportunity to make adjustments in your onboarding program — not only for that employee, but for future employees you’re going to be onboarding remotely,” she says.

Although individual hires’ specific needs will likely dictate some aspects of their onboarding, having a basic structure in place gives law firms and departments a roadmap they can customize.

Conveying how the onboarding process is going to look — including who will be involved — to employees before they log on to begin it, according to Sullivan, can also help make the experience easier.

“A lot of people may wait until the first day to start talking about that,” she says. “But [after] they’ve given their notice to their former employer, that’s a good two weeks. They probably have anxiety about their onboarding [being] remote. I describe this as putting your communication in overdrive so this new employee feels hand-held. If you can do that in advance — and script out what those expectations are — you’re off to a really good start.”

ABOUT THE AUTHOR

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