VIRTUALIZING YOUR RECRUITMENT AND ONBOARDING EXPERIENCE

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“It’s Not Just Working Remotely; Hiring and Onboarding Go Virtual, Too” is the title of a recent Wall Street Journal article that mentions Nonprofit HR! Organizations are making unprecedented decisions based on the “new now”. If your organization is seeking answers to continue growing your workforce and to ensure your people are supported and driving toward mission-critical outcomes, you’re in good company.

Nonprofit HR continues to support the talent management needs of social impact organizations, nationwide, and we will share tips and options you can use during the pandemic and afterward.

Register now and walk away understanding how to:

- Optimizing your employer brand
- Ensuring success in a virtual recruiting environment
- Leveraging best practices for virtual onboarding

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Alicia Schoshinski: Hello, everyone and welcome. Thank you for joining us this afternoon for Nonprofit HR'S Virtual Town Hall on Virtualizing Your Recruitment and Onboarding Experience.

My name is Alicia Schoshinski and I am the co-leader of Nonprofit HR's Knowledge Practice and a Senior HR Business Partner. I'll be your moderator for today. Let's go ahead and get started. Before we do, I'd like to go over a few items on how on how you should participate in today's event. You've joined the presentation using your computer's speaker system by default. If you would prefer to join over the telephone, just select telephone in the audio pane and the dial-in information will be displayed. You'll have the opportunity to submit text questions to today's presenters by typing your questions into the questions pane of the control panel. You may send in your questions at any time during the presentation. We will collect these and address them during the Q & A session at the end of today's presentation.

Today's webinar is being recorded and you will receive a follow-up email within the next few days with a link to view the recording. You will also receive a copy of the slides. So today you're going to hear from Heather de la Riva, who is the director of Virtual Outsourcing at Nonprofit HR, and Danisha Martin, who is an Executive Search Consultant at Nonprofit HR. Heather joined Nonprofit HR in 2013 and during her tenure the Virtual Outsourcing division has grown exponentially. As a senior HR advisor, Heather has successfully led innovative and complex projects in Performance Management as well as Workforce Planning and Process Improvement across the HR lifecycle and numerous HR assessments. By developing strong partnerships with executive leaders, Heather has become a change agent in the transformation of organizational culture.

Danisha is an executive recruiter and trusted advisor on the firm's retain Executive Search engagements. She works collaboratively with Nonprofit HR's Executive Search practice leader on search strategy and business development initiatives. Danisha has over 15 years of combined experience in Talent Acquisition, Human Resources, Sales, and Entrepreneurship. Danisha has successfully managed the staffing and recruitment needs for clients ranging from small and midsize operations to Fortune 500 organizations in both the for-profit and non-profit sectors.

Without further ado, I'm going to hand it over to Heather and Danisha to get you started.

Heather de la Riva: Thanks so much for that warm introduction, Alicia. Danisha and I are excited to be here with you today. The COVID-19 pandemic and social distancing has brought about many changes to the ways in which we're conducting our work, with many organizations shifting to virtual operations for the first time and into the foreseeable future.

We're excited to share best practices that we've learned as Talent professionals and as a team here at Nonprofit HR that speaks to our engagements with our clients. Today's focus is going to cover ensuring success in a virtual recruiting environment, tips for effective video interviewing, leveraging best practices for virtual onboarding, and a question and answer session. I'm excited to turn it over to my talented colleague, Danisha Martin, to talk with you about important considerations for a virtual recruiting process.

Danisha Martin: Thank you, Heather. Well, obviously we continue to hear what an unprecedented time that we're in and while that is true, we must also focus on how to move forward in our organizations despite all the challenges. Over the next few minutes, we'll delve into the strategy of what it takes to successfully virtualize your recruiting environment.

If you are on this call, you are likely involved in the recruiting efforts of your organization in some aspect. While you may be a novice or a guru at the virtual recruiting process, my hope is that this overview will assist you in preparing to consistently attract and select a high-quality candidate despite our current circumstances.

Let's first review what the typical recruiting process entails. The six key elements of the recruiting process are to plan and prepare, source and advertise, review candidates, assess and interview, candidate selection and offer, and then onboard for success. In the following slides, we will consider ways to align the recruiting process to the current demands of a virtual environment. The good news is many of you are already operating in this way or there are some aspects of the process in which you currently work within a virtual framework.

So, let's break down each step in the process.

Step one is to plan and prepare. It's critical to think through these important questions before you post a job or reach out to one candidate. Organization is key in any recruiting process, but especially now when there are many moving parts and you can't walk down the hallway to have a quick huddle with your talent acquisition team. You'll want to think about who you want to attract for this position.

Where can this Talent be found?

When do you need to fill the position?

How will you assess and interview?

The following tasks will allow you to address these questions. Start by building a timeline to map out your deadlines for each of the six steps in the process, highlighting key milestones. For example, when you want to have the phone screens completed, availability for video interviews, the target date to select your candidate, and the target start date for your new hire. Create engaging job descriptions and plan job ad campaigns. We'll discuss more on this during the sourcing and advertising piece.

You'll also want to develop a qualification matrix, prepare assessment tools, and identify tracking tools. We will talk more about this during the reviewing phase of the process. In selecting an interview panel, who are your key stakeholders? You'll want to make sure that you include the team in all of your planning because the more everyone understands how they fit into the process, the better the execution.

Planning an effective job ad campaign includes a number of different things. An ad campaign is, first of all, your detailed plan, including where you will post your positions, how often you will post, and it includes how you will implement your available budget if you have one for posting sites that are not for free.

Think about the ideal candidate and think about your Diversity, Equity, and Inclusion needs and where diverse candidates hang out. For instance, the National Association of Black Accountants and the Association of Latino Professionals for America as well as other similar associations all have job boards where you can post your open positions.

A well-written and engaging job description is so critical. You want to shift from a list of duties and responsibilities to your elongated elevator pitch. Remember your job description should be a dynamic and attractive marketing piece that really paints a picture, that entices highly qualified candidates to click apply. Remember to avoid language that excludes diverse candidates and use inclusive language.

If you need help with this, Megan Goulet of Monster.com gave a great webinar last week on unbiased recruitment writing. If any one of you might benefit from the recording of this webinar, we can post it in the chat.

You'll also want to refresh your postings frequently. Remember the adage, “out with the old in with the new”? Well, when you refresh your postings on job boards, you position your role right at the top. Also, consistency is key; post and analyze the results of your applicant flow, then tweak and repost. In other words, wash, rinse, repeat.

Let's take a quick poll. Passive recruiting is when you post, candidates apply, and then you review your applicants. Active recruiting is when you source, or seek out, the ideal candidates for the role and usually, they already have jobs.

So, the question is: when you are actively reaching out to candidates, how many of you prefer to call candidates on the phone in the first outreach?

In comparison, how many of you prefer to email candidates in the first outreach?

Then finally, some of you may prefer to text message or message in someone's private or direct mail through their social media, whether that be LinkedIn, Facebook, Twitter, or any of the rest of them.

I believe you should now be able to select your answer. Alicia, I'm not sure if you're able to see answers coming in.

Alicia Schoshinski: Yes, I am. We’ll give people about two more seconds, then I'll close it, and you should hopefully see the results.

Danisha Martin: Awesome. So again, how do you prefer to initiate an outreach with a candidate that you're actively sourcing? If you prefer by phone, click phone; email, click email; and if you prefer to text or reach out to the DM’s, let us know.

Okay. Well, this is very interesting. I see that 27 percent prefer to start with the phone.

Only five percent prefer with a text message or a DM, but a whopping 68 percent of you prefer by email and you know, this doesn't surprise me. While there's no necessarily right or wrong answer, I want to give you a couple of quick tips and best practices for most effective sourcing.

Remember, the phone is your friend. I would suggest that we flip this around and go first with the phone, then email, then social media and texting because that is where everyone is or should be: at home or sheltering in place, unless they are our heroic essential workers. So, leverage that. Emails get lost in space, otherwise known as spam, and if you get the voicemail, you can always leave a message. Of course, you'll want to be brief, however, the goal is to get your candidates to call you back for more information.

If you do reach the candidate, then you can do a short phone screen to confirm their interest and schedule a phone interview. But remember, the phone is your friend and it's the best way to make a real connection with a highly qualified candidate. Use email as your backup.

The voicemail that you left is back-up or it's to confirm the appointment that you made when you caught them on the phone. Then that way you can confirm the phone interview as far as the date, the time, and how you will contact them. Lastly, leverage social media as a way to really engage your candidate because on this platform, you can incorporate unique experiences or skills that they've highlighted in their profile and that, of course, is very engaging to candidates.

However, remember your best job ad is actually your current employees. Above all, this is probably the most underutilized resource for sourcing and advertising, and you can incentivize employee referrals through an employee referral program. You can ask your employees to post a mention of your job on their social media and email it directly to their network of friends and family. Remember, birds of a feather flock together.

So, if you love your employees and want more folks like them, engage them in an employee referral process, but always remember to have them include a call-to-action such as “Please send your resumes to XYZ at gmail.com.” Also remember, your employees can promote your brand. I'll give you a quick example. Last week Nonprofit HR was so kind to send every employee a snack box and let me tell you, it was fancy. Then, we were invited to take a selfie with the box. I happen to post my selfie on LinkedIn and without a call-to-action. My inbox was peppered with inquiries about our firm. Why is this? It's because people are drawn to a healthy culture.

So, let's move on to step three which is to review candidates. Be consistent in how you screen candidates. It's so important not to relax your compliance standards. Be consistent in how you screen and do that across the board. An effective solution for this is a hiring matrix. This is a tool that helps you to quickly and easily screen for qualified candidates. The minimum qualifications are plugged into the matrix where you can quickly review resumes and applications to ensure they qualify and then move them to the next phase of your process. Beware of bias when you're reviewing candidates on sites like LinkedIn and other social sites.

Don't let the photos and information about a candidate's affiliations preclude you from giving those candidates a fair shake at the role. When you're working with a selection team, consider using tools that allow you to share your progress in real-time sites like Google Sheets, Smartsheet, and Dropbox. These can definitely help you to do this to keep everyone on the same page at the same time. It's critical when you're working in a virtual environment. Now, it's time for step four: assessing and interviewing our candidates.

Before COVID-19, many of you were already employing video interviewing. But if you weren't, your interview plan may have included a phone screen and initial in-person interview followed by a second-round panel interview, also in person. Now, it will likely look something like this: a phone screen, a first video interview, and a second video interview. My suggestion is that you consider moving the panel interview to the first interview. There are a few reasons for this. It will help you leverage time and resources and it will also allow you to divvy up the roles. For example, having a note taker. Finally, with a video interview, it's always helpful to have more than one set of eyes and ears so your team can collaboratively give feedback on each candidate.

The second video interview can be used for finalists, where you can dig deeper into a behavioral-style interview and learn more about your candidate in a more interactive conversation. Whatever you decide, stick to your interview plan and don't worry, we'll dig deeper into interviewing on a virtual platform in just a moment for those of you who are new to it.

Lastly consider alternative methods of assessing talent to round out your vetting process. For example, requiring a cover letter or a writing sample is very helpful. Also, behavioral or skills assessments can be helpful to continue to vet your candidates in the absence of in-person interviews. Nonprofit HR uses something called the PDA for high-level candidates, which is the Personal Development Analysis.

This is an assessment instrument, scientifically validated by the American Institute of Business Psychology, designed to objectively assess the behavioral factors that influence the performance of individuals in their work environment.

So, now that you've developed an active pipeline of qualified and engaged candidates, you must keep these candidates engaged. Remember to always close candidates on the next touchpoint and confirm the next appointment before you end your interaction. Whether it's a phone screen or video call. After the interview, over-communicate. Even if you're update is to simply say that there's more info coming soon.

You've heard people say “out of sight out of mind” ? Well, stay on your candidate’s mind.

Step five is the exciting part, candidate selection and offer. This phase reveals whether or not your process was successful. So, consider your offer process. Normally, it likely includes a phone call for a verbal offer followed by a written offer through email. However, decide if a video call is more appropriate during your offer process. This could be an opportunity to engage, read body language, and initiate necessary negotiations to close the deal.

Once you've composed your written offer, include an outline of the post-offer process. Confirming this in writing will clarify a multi-step process and alleviate your candidate’s anxiety. Remember, these are uncertain times and everyone is on edge to one extent or another.

In fact, I recently placed a finance leader for one of our notable clients. Walking him through the post-offer process was very, I won't say difficult, but it was challenging because, as he should, he had a heightened level of anxiety and was a bit on edge, especially because this candidate was considering another offer that he had on the table. Imagine being in that person's position when you've not had a chance to meet in person, but you now have to make a decision about what employer you'll choose. So remember, it's better to over-communicate and build a strong rapport to ensure that your candidate shows up for onboarding.

You can use multiple modes of communicating, via email, text, phone, and that all provides an approach that engages the total person. Just think of your friends and family. You don't only connect with your friends through one mode of communication. The organizations that adapt quickly to a more human-centered approach and are less robotic will do very well.

So, I promised you earlier a quick crash course in effective video interviewing, that was a bit of a tongue twister. With a few tips and best practices, you'll be a Zoom pro in no time.

You'll want to make sure that you always do a technology check. This means your audio, your visual, and your internet connection. Also, remember to design your video interview room well.

Create an appealing and professional video interview room. Consider what the candidate will see. If you have a very high-quality camera and a virtual background that looks good then utilize it, but if it's grainy and makes you look like one of those 80s music videos, I would not suggest it. Consider decluttering your space, preparing your lighting, and positioning your device in such a way that you can look straight ahead at your video camera versus looking down or looking up. You would be surprised what an impactful change this makes to the viewer.

Also, of course, clear all distractions; silence alarms, cell phones, and children, especially your furry children or any other quarantine co-workers that you may be sharing space with. Be sure to do a warm introduction of yourself and your colleagues and share an impactful statement about your company and the position. Remember, this is a chance for you to make an impactful impression on your highly qualified candidate so take the time to outline the agenda for the interview which can be done ahead of time in your confirmation email.

However, even on the video call you'll want to give a quick frame of reference for what they can expect over the next several minutes of the interview.

Maintain eye contact. You might be wondering how exactly do you do that on a video? Well, you look directly into the camera. This is called virtual eye contact and while it may seem strange because we're all tempted to keep our eyes on our own faces. When you look directly into the camera, again, you're creating a warm and engaging environment for your candidate.

Practice active listening. This means repeating your candidate’s questions back to them before you answer. It means summarizing what you've heard their answer to be and it also means that you engage your candidate in conversation versus a simple question-and-answer interrogated approach.

Another tip to engage your candidate well over a video interview is to take your time. It can be so tempting to rush but consider connection speeds and audio dropping out and all of the rest of the things that can happen with technology. Consider that your candidate may also be acclimating to the video platform and might be a little extra nervous.

Capture thorough notes. It's so helpful to designate someone to do this for the group and/or you can record the video, but make sure to get your candidates permission first.

Finally, but not least, smile. You're not on Candid Camera, but you are on camera. That was for the Gen Xers out there who will get that very corny joke. The point is to be mindful to bring your whole self to the video interview and resist again the temptation to be distracted by the technology, devices, etc.

In other words, you don't want to miss the chance to truly connect with your candidate. For a more detailed tutorial, LinkedIn learning offers a great training entitled Executive Presence on Video Conference Calls, and I highly recommend it. Alicia, this brings us to the conclusion of the virtualized recruitment experience. Shall we check for a few questions before moving on to the onboarding experience?

Alicia Schoshinski: Thanks, Danisha. We actually do have a number of questions. Let me give you a few and then we'll save the rest for the end. Let's see, somebody asked: if you have an applicant that does not have access to video conferencing, what would you suggest?

Danisha Martin: Wow, that is a really good question, Alicia. You know, a number of things come to mind and to be quite honest, I hadn't thought through that because we were making the assumption that your applicants would be able to access it. One thing that you could you could suggest is, and this is not ideal, but if your applicant can borrow someone's smartphone. Zoom still works on the smartphone.

Obviously, a lot of candidates will not have access to computers or laptops in their home, but most everyone owns a cell phone and most of those cell phones are smartphones. You can get a decent

picture through FaceTime, through Skype, and through the Zoom platform on your smartphone, so that would be my suggestion there.

Alicia Schoshinski: Okay, thank you. Somebody else asked a question about when you're at the offer stage. If you were scheduling a virtual meeting with a candidate that you're going to offer the position to, how do you manage scheduling that without causing too much anxiety for the candidate?

Danisha Martin: Yeah, that's a great question as well. Again, this is something to think through. With every candidate, it may not be, or every position I should say, it may not be appropriate. Particularly for your higher-level roles and the reason is that in your high-level positions, the candidates for those roles will have questions and they will likely be poised to move through an offer conversation over a video. Those higher-level candidates would likely be very receptive to that level of engagement.

However, for some of your other roles that are staff level or even some of the entry manager levels, it just may not be appropriate. It may be appropriate to simply do the phone on the verbal and follow up with the written over email. I hope that makes sense.

Alicia Schoshinski: Okay, and then two clarifying questions. Could you repeat what PDA stood for again?

Danisha Martin: Oh, absolutely and I'm happy to say that for all of our clients at Nonprofit HR, for the higher-level manager positions and above, the PDA is actually included when they retain us. This is called a Personal Development Analysis, it was designed by the American Institute of Business Psychology.

Alicia Schoshinski: Okay, and then also could you repeat the name of the LinkedIn Learning opportunity you mentioned.

Danisha Martin: Oh certainly, and actually if you happen to have a screen up with LinkedIn on it, there is a tab. I'm just going to see if I can direct people to it.

If you're signed into your LinkedIn account, in the upper right corner is how I see it on my account. On the far right, there is a tab that looks like a grid of white squares and if you click it, there's a number of LinkedIn products including learning insights, posting a job, etc.

If you click on Learning and granted, this may or may not be possible to everyone depending on your LinkedIn package. However, if you do have access to the LinkedIn Learning, once you click it there, you can simply type it in. If you type in Executive Presence for Video Conference Calls, you should have access to the presentation. You'll know that you have gotten it when you see a woman with a blue blazer and her name is Jessica Chen. You can also probably search by the name Jessica Chen and again, it's called Executive Presence on Video Conference Calls.

Alicia Schoshinski: Okay, great. Thanks, Danisha. We have more questions, but we'll hold them to the end to go ahead and let Heather continue.

Danisha Martin: Sounds great. So, congratulations, you've successfully virtualized your recruiting process. Your candidate has accepted the offer. Glory Hallelujah! Now, what do you do? How do you successfully onboard your new hire, Heather?

Heather de la Riva: Great. Thanks so much, Danisha, and thanks for those great tips not only on virtual interviewing, but also on virtualizing your recruiting process. As Danisha said, you've done a lot of work through this recruiting process and you'll want to ensure a strong experience as your employee begins. Some of you have been doing this for a long time and to others, structured onboarding, whether virtual or not, is an entirely new process.

If you haven't done it before, you're not going to do it well overnight and that's okay. Admitting that it's a work in progress, seeking feedback, being honest and humble as you go along and learn with your new employee will go a long way.

If you already have an onboarding program, how do you change the timeline of that program and ensure that you get the right pacing in cadence for your different meetings? What's truly important in the onboarding process? How does it fit within the puzzle? What do you need to share immediately versus what can you share later? Definitely providing a balance between providing information versus overwhelming the employee will be important as you design a rhythm for your program.

How do you ensure that culture comes through and it's informative, but that it's still fun?

How do you work to engage your entire team?

How do you get your employees the resources that they need?

We're going to take time to hit on all of these things as we talk about leveraging best practices with virtual onboarding. So, let's begin and talk about why onboarding matters.

By looking at some recent surveys for a few key metrics, there are some common themes here. Organizations with strong onboarding programs consistently have better retention and engagement metrics.

The first one you see here is from Glassdoor. Organizations with a strong onboarding process improve new hire retention by 82% and productivity by over 70%. Integration of your new hires from the beginning is so key. Understanding how their role ties into the larger organization will increase immediate impact. In a recent SHRM poll, 69% of employees are more likely to stay with a company for three years if they experience a great onboarding process.

This important piece of the HR life cycle will have a lasting impact on your employees and the retention of high performers. Finally, in an Urbanbound survey, 77% of employees who had a formal onboarding process hit their first performance goals. We'll talk today about how to make outcomes and goals part of your onboarding process to give immediate direction to your new employees, particularly during this time of uncertainty.

What makes for a great onboarding experience? It's a question that lots of organizations ask and there's three key tenants that I believe very much remain the same from both in-person as well as virtual onboarding. It's how you're going to go about the execution and thinking of creative ways to deepen and broaden the virtual experience that might change.

We're going to start here for an overview and dive deeper within each of these important and interconnected areas. Let's first talk about relational. It's all about your people. How are you going to welcome new employees and provide guidance for them to build relationships? How will this look different in a virtual world? Building relationships not only with their team and department, but also with other key stakeholders across the entire organization.

Your virtual buddies are so important and having buddy programs is definitely something to think about as well.

You're going to want to ensure culture and strategy. Ensure that new hires understand and can feel the culture, demonstrating from day one and how important it is. Providing guidance and communication around those strategic plans, mission, vision, and values. It's what ties everyone together.

Then, administratively and operationally, the last key component of any onboarding process. How do you get them the resources that they need in a virtual environment? What do they still need? What's different? Getting a handle on this from your current staff can be helpful to understand how they've successfully transitioned into a virtual environment and how you might be able to do that for your new staff members as well. Then, finally ensuring that technology needs are met and there in an overview on outcomes and priorities. This will help them to come on board and understand what those goals are during a time of uncertainty.

So, let's begin with building those virtual relationships.

It really needs to be a team effort. You've just finished this wonderful recruiting process that Danisha talked about and you'll want to continue as you welcome your new hire. Onboarding starts well before the first day, reaching out ahead of time to keep candidates warm between when you extend and have an accepted offer to when they actually start is going to be key, especially in a virtual environment and during a time of uncertainty.

Also, having your top leadership team and your Executive Director and CEO reach out to welcome new hires will be a great way to begin for them to see how your organization works. Your manager is the key person in this entire process. They are the person who's going to be building a very strong relationship and the key person in bringing them into the organization.

Who interviewed your new hires and who will they be working most closely with? Who are those people, and can they be reaching out to welcome and asking if they have any questions prior to starting? Also asking how you can alleviate any fears or concerns that they have with a team approach can be huge here. You're going to want to make sure that you take the time to take important information sessions, but also try to keep it light and fun during the process, just like you would when you’re bringing employees on in an office.

Can you have some virtual lunches or happy hours? How do you get to know your people beyond just the work that they're doing? Who are they and what do they like? We've had the opportunity at Nonprofit HR to talk to some of our clients and they're doing a lot of really fun things, such as bringing in a comedian for a happy hour.

For example, one client actually had an employee who moonlights as a DJ and he had the opportunity to bring some music to their virtual happy hour. We mentioned before and I'll say it again, a buddy program is so essential. This is someone who's outside the employees’ team or immediate circle. It's someone who's going to be a touchpoint outside of the immediate work they're doing where they can ask questions or alleviate concerns.

We've had a buddy program at Nonprofit HR for years for internal hires and it's been a great way to really integrate people to the team immediately and feel cross-connectivity within different areas.

Also, ensure meetings across the entire organization. How are you getting everyone involved and making sure that you're putting together the right timing for how that's happening?

You've brought on this new team member and you want to celebrate them. It's a big deal to start your first day, whether it be school or a new job, whatever it is. Even though it's not in person, it's still their first day. So how do you find a creative way to celebrate that? We've had a couple of clients who really started with a 10-minute welcome meeting and we do that a lot on video.

It looks like it might even be a Brady Bunch type of Zoom, but how do you get everyone in there so that they can see people, and everyone can say hello and welcome? If they'd been in an office, most new employees would have had the opportunity to meet them in person and you want to work to kind of mimic that and find ways to do it. You can send something like flowers, a plant, a fruit basket, or something to say welcome, we’re so excited, good to have you, etc.

Are they a tea or coffee person? You could send a packet that welcomes them with those things. While you won't be having tea or coffee in the break room, you can have that internally. Also, as Danisha mentioned, Nonprofit HR sent us these amazing snack packs last week that really brightened spirits and everyone's week. This would be a great way to start new employees off to have something small.

However, it is a challenging time and maybe there isn't additional money in the budget, so what can you do that's creative that isn't going to break the bank?

Could you do a digitally recorded welcome message where different employees create a selfie and then send it along to the new hire? Look at digital cards or welcome emails or maybe everyone could share pictures of the first day just like you do at school but find creative ways that maybe don't cost money if that's something that's of concern.

I think we've talked about it over and over again, but technology is going to be so key in any type of virtual recruitment or onboarding experience.

Here at Nonprofit HR, we utilize the platform Zoom and it's worked really well for us, but there's a lot of others that are out there as well, such as Skype, BlueJeans, or other platforms that allow you to see people as you're talking. Being able to build relationships while keeping that virtual eye contact is going to be key to not only building the relationships quickly, but also sustaining them. Do you have any type of chat programs that could work for you? Like Slack, Microsoft Teams, or others that might be more comfortable or ones you already have set up. A lot of our clients also utilize Google Meet which they found to be helpful too and finding other ways to communicate will be important as well, such as email and text. Having varied forms that are formal as well as informal, just like you would when you're in person, will be key to mimic.

Finally, to build those strong virtual relationships, having intentional and increased communication is going to be important.

Now is the time to have those meaningful conversations right from the get-go with supervisors and employees asking directly: what do you need to feel successful, how can I best support you as you come on? What do you need from me as a manager to be able to do your work well? And come back to those questions at the two-week, 30-day, 60-day, 90-day mark because what they feel initially, they might not know what they don't know yet and it’s going to be important to continuously re-evaluate that.

Really get to know your people. How are you doing during this time of uncertainty? Tell me about yourself and what I should know about you. What makes you, you? What do you enjoy doing? Finding ways to connect and building those connections when you don't have a water cooler or lunchroom is going to be important too.

You're also going to need to find the right number of meetings and check-ins and initially the number should probably be higher. We've seen a lot of articles recently that point to the fact that managers should be checking in with employees daily in those first couple of weeks. You can find ways to vary those meetings. Some should be regularly scheduled check-ins, others might be a quick text to let them know that you have time to connect, or maybe a quick email, quick Zoom, or whatever platform you’re using, but ensuring that they know that you're there when you need them is going to be important.

Asking how they like to communicate, so that you can customize your style to what their needs are, will also be key as well.

Moving on to the next key tenant, you're going to want to continue to tie strategy and culture to your onboarding experience. Reviewing your strategy documents should definitely be a priority session at the beginning of your onboarding process. Probably within the first day. It should be led by someone, if not your CEO or Executive Director, on your leadership team. What is the strategic plan, the mission, and values of the organization?

Your vision is the glue that ties you together. Who are you and what is your purpose? What are you trying to achieve? While it might shift slightly, it won't shift drastically and it’s the glue that's going to continue to tie you together. Where does their role fit in? Ensuring that the new hire sees the interconnection with different teams and departments is going to be imperative, reviewing that organizational chart and showing them exactly what that looks like.

Are you able to get some pictures in there so that employees can refer back to this when they're not quite sure who someone is? Maybe with those pictures is a key tidbit about someone, how long they've been there or a piece of personal information, that can allow employees the opportunity to bond before they even meet.

Depending on the size of your organization, you're also going to want to decide if having team or individual meetings, that represent the larger team, makes the most sense and that really will depend on each unique organization.

Communicating culture in a virtual environment is going to be so key. Do you have any type of cultural welcoming committee? Who are your most creative and positive employees at your organization? Who are the cheerleaders? Who champions culture well? Lean on your team. Who are the influencers or natural leaders who really can talk about the culture and how it impacted them?

Have you thought about putting together some type of cultural document? If you haven't, these could be easily created. A quick one or two-pager that gives a feel for your organization. It could include your values, how the organization supports your employees, include testimonials or quotes from your staff that talks about the organization and how they're a part of it.

Again, what are you doing to welcome those new hires and how that aligns culturally. Do you have some type of virtual lunch to welcome them? You could go online and order everyone lunch from GrubHub to have it delivered so that they could all eat together on a video and while it's going to look a little different, there are ways to definitely bond over that as well.

Having a result orientation with balance and flexibility is going to be key. If you already have an onboarding platform that you utilize in person, maybe it's packed within a few days of that first hire. What we're going to recommend is that you need to spread that out over the first few weeks or the first 30 days. Onboarding now is going to be a longer-term experience.

Zoom burnout or video conferencing burnout is real, so finding the right pace will be key and ensuring that those essential meetings are at the beginning of your onboarding process with those overviews in the key deliverables that are going to be needed in the cultural pieces. In doing so, employees know how they fit within the organization. Then, spreading other things throughout the rest of those 30 days.

Finally, you're going to want to look at key administrative and operational considerations.

What do your new employees need to ensure that they're able to do their job? Computers, monitors, documents, access to different systems that you have, etc. Get them tools prior to their first day and having them shipped to wherever they are to ensure that they're ready to go when you begin. Is your operations team able to put together an overview document of how to set those things up remotely from home so that it's user-friendly? Then, having your IT department follow up to ensure that people have the different programs they need that first day to really hit the ground running?

Following up within the first few days and weeks to see if additional help is needed will be important. Some new hires will be really tech savvy and catch on quickly and not need a lot of additional support, but others won't and so it will be important that you tailor your approach because those that might not be comfortable in a virtual environment will now suddenly find themself in one.

You're going to want to ensure that your managers review the position, the outcomes, and the initial goals, both short and long-term. Providing guidance and laying this out so that your employees know what's expected and then managing to those outcomes, deadlines, and deliverables. It's going to be essential to build a lot of trust in a virtual environment and you're going to need to make sure that you're managing to those outcomes and deliverables versus what people are doing on a day-in and day-out basis.

Don't forget the ever-important new hire paperwork and benefits review. While this might not be the most fun piece of recruitment and onboarding, it's definitely essential and important from a compliance perspective. Benefits can be confusing, even to those who know and understand them so don’t assume that your employees understand the nuances of all your offerings. Make sure you go through it with them at their pace to fully, outlining what the offerings are and how to utilize them will be important.

This is a great time as well to utilize your broker, if they have specific questions around health concerns or questions about unique pieces to your plan that you might not know the best about.

You also want to try to digitalize your new hire paperwork and get that out to employees prior to them starting. Paper forms have really gone out the window and there's a lot of ways, whether through different online sites or your payroll provider. This is going to be a great resource for that where you can digitalize the different forms that you need to be using with your new hire paperwork. Many of you might have been worried about how you're going to complete the form I-9 and to be able to verify documents in person the Department of Homeland Security realizes that the COVID-19 pandemic has created unique challenges to that. They’ve now lifted the requirement to verify original forms of identification in person. You can now do this over fax, by email, texting pictures on a phone, or a video review can work really well too.

Once you've come through this experience, you'll need to verify these forms in person, and they'll be different additional guidance around how best to do that in a compliant manner once we have kind of come to the end of COVID-19. The Department of Homeland Security has really great resources on their website of how to go about doing this and what it'll look like in a post-COVID-19 world.

The other piece too is if your onboarding a lot of people, utilizing technology for your new hire paperwork, whether getting a small human capital management system or HRIS utilizing your payroll platform in a different way to be helpful. I know we also had a couple of questions prior to us even starting the webinar about how best to have employees sign forms. You can use everything from a PDF reader to have them insert a signature to actually utilizing a program like Adobe DocuSign, which is what we use at Nonprofit HR to get digital signatures.

Recently, I heard a story about how a manager met a new hire in a parking lot to verify documents and give them their resources. I'd really encourage you to be safe during this time. Mailing and going about doing onboarding in an online manner through digitalized documents is probably the best way to go about this.

We're all new to this process and seeking feedback is important. Asking your employees what they need to be successful will be key and asking what worked in this virtual onboarding experience and what you could have done differently or better will be important to ask them too. I wouldn't just ask the new employees. I'd also ask those that are participating in the process because your current employees are going to have really great ideas and be hearing stories about how others are doing it well or what isn't working. We can all learn from each other during this process.

Making changes and adjustments for your next orientation will also be key once you get that initial feedback. 30, 45, 90, and 120-day check-ins to gather more formalized feedback and checking in as an HR department will be important as well. Setting the right cadence of when those check-ins should happen should be done by you, you know your organization's culture and what makes sense.

We wanted to point out that you never get a second chance to make a good first impression. The experience in how you treat your candidates and employees from the onset will set the tone for your relationships with them. Start from the beginning and put your organization's best foot forward to ensure that employees have the resources they need and feel prioritized in a virtual and uncertain time. This will help them to make a more meaningful impact on your mission quickly and tie them to your organization for the longer-term.

As we end today, we wanted to remind you of a few key takeaways. Danisha?

Danisha Martin: Thanks, Heather. Yes, if you'll recall, you want to make sure you start out by aligning your recruiting process to a virtual environment, always ensuring that you're maintaining high candidate engagement as well as ensuring a positive virtual interview experience.

Heather de la Riva: You also want to make sure that your onboarding takes a holistic approach and it should include relational, strategic, cultural, and operational components. Take the time to ensure the right cadence and pacing for this. It shouldn't happen in days, but it in weeks and over the course of several months.

Leverage your entire team to helping ingrain and teach your new hires about your culture. You want them to feel a part of your organization from the beginning.

We want to thank you so much for joining us today. Danisha and I were so glad to be able to spend this last hour with you. We'll now turn it back over to Alicia so that we can start some question and answers.

Alicia Schoshinski: Great. Thank you Danisha and Heather, for all the great information you shared this afternoon. We definitely have some time for questions and answers. So, if you have questions, please continue to type them in the questions box and we'll get to as many questions as we're able within the remaining time that we have.

We do have a number of questions. We have one question related to what you were talking about Heather with the I-9 form and if you're an organization that is not 100% remote. The question was they believe the Department of Homeland Security only waived ID screening for those who are 100% remote, is that correct?

Heather de la Riva: Thank you. Sure. We can double check that, but I believe that the requirement has been waived across the board. We can double-check on that and make sure that we get back to you on that. I think that, first and foremost, it's about being safe and making sure that you know your employees are showing the identification but doing so in a manner that ensures the safety of both your managers and your new employees.

Alicia Schoshinski: Okay, great. Then in terms of having new hires come on board, what recommendations do you have for maybe check-ins or performance review timelines? Such for the three, six, and nine months out, as part of this kind of bringing them on board effectively.

Heather de la Riva: Sure. So, looking at how you go about Performance Management very much ties back to the type of organization in the culture you may have. You know the best cadence for that for your internal organization. There are many clients that we work with that have moved to more of a constant feedback structure and they might have a more formalized check-in at the 30-day mark, but then again at a year because they're constantly having those conversations.

I think that you can break things up in a quarterly type of bow and look at it in that direction, but I think more often than not it's having those regular check-ins initially. Then having managers and employees checking in regularly to say: are you getting the feedback that you need? How can I support you better? What could we change about the rhythm of this or on a longer-term basis? How can I make sure that you have the feedback that you need? It's ensuring that the important conversations are happening. I don't know if the schedule is as important as ensuring that the feedback and the relationship building is happening.

Alicia Schoshinski: Okay. Thank you. Somebody asked the question about background checks because I believe background checks are taking a little bit longer these days. Then, there are others that maybe they can't do during this period. Any suggestions for dealing with when you can bring them on board, but you can't give them full access to all your systems because of this?

Heather de la Riva: Again, I think it would depend on the type of work that you're doing and what type of confidential information might be within your systems. A lot of our clients have confidentiality and non-disparagement agreements or actually have clauses or policies about this within their employee handbooks. So, I would point to looking at things in that manner, but I think in making contingent offers and then ensuring that you're doing background checks as appropriate and consistently across the board would be key as well.

Alicia Schoshinski: Okay, and then another one for you, Heather. What are some things you've seen as strategies for HR to support hiring managers in the onboarding process and how can you encourage managers to play a larger role in that process?

Heather de la Riva: Absolutely, I think that HR is really key to creating certain pieces of the scheduling and how the actual orientation is going to be done across the board. In ensuring that managers have the right training and are able to answer the questions as it relates, different managers will need different levels of training. While there should be some type of initial support and training across the board, some will need more than others.

So be there as a resource and tool to brainstorm with them on how they can be most impactful and feel comfortable getting their employees what they need. However, I think setting up the operational and administrative components, either on your HR or operational team to remove that burden, and ensuring that managers have a set checklist of what the key types of conversations in meetings that they should be having are, and what the right pace of that is, will help them in putting those together.

Alicia Schoshinski: Okay, great. Thank you. I have a question for Danisha. Somebody is looking to start a phone screening process for candidates and they wanted to know if it's better just to cold call them and ask them the questions then or if they should set up a time to officially speak with them and ask them those questions.

Danisha Martin: That's a great question, Alicia.

I think that the best way to do this in this environment is to definitely cold call. The reason is that, again, time is of the essence and for those organizations that are hiring you can imagine the mass amounts of candidates who are looking due to furloughs layoffs and all manner of other circumstances. So, you want to be the first to make the good impression and to engage those candidates and time is lost if your email lands in spam or anything like that, so go ahead and reach out to them.

If you are able to connect with the candidate, be respectful of their time and say,
"Hey, I understand that we didn't schedule this call, but now that I know that you have an interest, do you have 15 to 20 minutes now to do a phone screen or can I go ahead and schedule that for you?" That way you're being respectful, but also you're taking advantage of making that contact right then.

Alicia Schoshinski: Okay, thank you. Another one for you, Danisha, related to using recorded video interview platforms such as Spark Higher. I know for instance some of my clients have used that and it's been handy. You can have applicants record videos and you can give them all to a hiring manager and they can look at them when they have the time and then narrow down the pool a little bit. Any thoughts on using such a platform?

Danisha Martin: That's a great question.

I myself have not personally used platforms like that on the hiring end, but I have been involved with platforms like that as a candidate myself in my job searching past. There's two things that I would say, the first is that it can be a wonderful way to leverage time and to have kind of a repository where you can go back and pipeline candidates for future positions, but I want to say also balance it with the level of the role.

If this role is a high-level manager or above, consider that the candidate experience could actually be declined or suffer because candidates at that level want to be engaged on a more personalized and specialized basis.

So if you can, think through how you can do the phone screen and then put that person into the remainder of your process with your video interview versus putting in them into an automated recorded video platform, they can share more of the social experience with you.

Alicia Schoshinski: Okay, and then I see a couple of questions related to group interviews. One looks like it's asking about, if you have multiple interviewers, what do you suggest is the most effective way to do that virtually? Then the second question related to that is if you want to interview for certain types of tasks like to see how they do in a team, is it feasible to do an interview like an interview role play simulation where you have a group together? So, a couple of questions on group interviewing.

Danisha Martin: Thank you. I'll answer the first and then I will need to revisit for clarification on the second. The first is how to effectively approach a group interview, there's a couple of things. One, you want to have what we at Nonprofit HR refer to as an interviewer's toolkit. In the toolkit are all of the questions that you are going to ask consistently to each candidate during the planning phase. You'll want to organize those who will ask questions versus those who are there to observe and take notes. When you introduce each member of your panel, be sure to, if time allows, let everyone say a very brief 20 second intro of themselves, their name, maybe how long they've been with the organization, and a welcome type of thing. Then, let them state their role. I'll be here asking questions. I'll be here observing the interview. That kind of thing. This puts your candidate at ease and it also organizes the flow.

In your toolkit, you can also preassign which panelist is going to ask which question and since everyone is working from the same information, that will allow for a very smooth transition from the first question on down to the last question. Now, hopefully that answers that person's question. Alicia, can you give me that second question once more about the tasks?

Alicia Schoshinski: Yes, so specifically it says when video interviewing, what do you suggest for performance tasks that involve a group? Such as a mock interview role play type simulation. Would you suggest the format is like a panel interview?

Danisha Martin: Okay, I'm still struggling a bit to clarify, so if that person can further clarify, that would be helpful. What I think it means is if there are a number of tasks that you are looking to clarify, whether or not that candidate is able to perform the tasks. Say there are varied tasks that you're screening for, would it be best to do a panel interview? The answer to that is yes.

For instance, if you have a person in a role who is going to touch or interact or interface with a number of different teams, than it is helpful rather than doing three different interviews with each team, to bring a stakeholder from each team to a panel environment. That way you can collectively vet if this one candidate has the skills to address all of the various teams' needs.

Alicia Schoshinski: Okay, and that sounds like that's where I interpreted the question as well. So, thank you Danisha. A couple of questions related to people, maybe people's hesitancy with the virtual process. How do you handle a candidate who refuses to basically show their face on your video interview? Should you respect their wishes, or should you push to have it be a face-to-face processing video?

Danisha Martin: That's a great question, Alicia. The key to this is planning and preparation. People are much less apt to push back if everything is laid out in the beginning.

For example, here at Nonprofit HR when we're retained, part of the process when I reach out initially in source candidates or when I respond to applicants is to lay out for them the full interview and selection process from the very beginning. This allows candidates to self-select in or raise concerns or self-select out. For example, there are some clients whose process is very elongated. Again, with the Executive Search work that I do, candidates may be asked to do a phone screen with me then go on to a phone interview with the client then go on to a first, second, and even a third video interview with all manner of stakeholders.

Whether it's board members, whether its teammates, whether its potential direct reports, and the rest of it, this can be very fatiguing to candidates. However, if they are well prepared in the very beginning and start to acclimate to the idea of what they'll need to do, then this is a hurdle that you can overcome. If you are dealing with staff level or middle management level roles, there's no difference.

Whoever is in charge of the phone screen should also prepare candidates for what they have to look forward to in bulleted fashion so they really understand the process, they have a chance to ask questions about the process and raise concerns about the process. One of the things that we provide here when we are retained by our clients is ongoing coaching for candidates. So, that could mean in the prep call. I'm actually running a mock video interview with a candidate who's never done it before, helping them with some of the same tips I shared here. Things like lighting and position of their device and how they can make sure that their environment looks professional and things like that. This puts candidates at ease and gives them a much better opportunity to present their best face, if you will, in a video interview.

Alicia Schoshinski: Okay, and then somewhat related, if an organization is evident to make an offer, if they haven't met in person and if they want somebody to relocate, is it reasonable to expect them to relocate during this time of stay-at-home work?

Danisha Martin: It's definitely unprecedented times that were in and I think, again, here the biggest issue is moving through this process with empathy and with a genuine focus around the human element.

Your recruiting department and talent acquisition team must be extra sensitive to the dynamics that candidates are facing, checking in along the way with candidates as they continue to matriculate through the process will be critical.

In other words, at every phase of the process, you'll want to check for their engagement and desire to move forward. You'll want to check for concerns that they have about moving forward. You'll want to address those concerns by going back to your organization and getting the information that will help to put the candidate at ease or help to clarify their questions. Then, come back to the candidate in a timely fashion and let them know how they can address those concerns again.

Some of the aspects of this are a little bit deeper than what we have time to really address here. Overall, you really want to approach every single candidate as if they were your VIP candidate because in this environment every candidate is a VIP quite frankly because it is a very difficult scenario to navigate. However, again, with over-communicating, checking for understanding, and checking for concerns along the way, you will be able to overcome some of this.

Now, some candidates fall out, of course. Yes, yes. Some candidates will say it's just too volatile of an environment, the employer that I'm with now feels secure, or I would prefer to just stay where I am until I know what's going to happen in the future. Though for some candidates who, again, have been laid off or there's uncertainty in their organization, they will be extremely open to moving forward with your organization if you've done this process correctly.

Alicia Schoshinski: Okay. Terrific. Thank you, Danisha and Heather, for all the information you've shared. That's all the time we have for Q & A, but we do thank everyone for attending today's webinar. We hope you found it valuable. We will be hosting another Virtual Town Hall next Monday, April 27th and the topic will be around Grief, Trauma, and Depression within your workforce, how it is showing up, and how to manage it. That will be a panel discussion, so we hope you can tune in for that.

Please be sure to complete the feedback survey that will pop up once the webcast has ended and if you'd like more information about available services or support from Nonprofit HR, please email us at info@nonprofithr.com or visit us on the web at NonprofitHR.com. This is where you can also access our COVID-19 resources, at the address you see on your screen NonprofitHR.com/COVID19. We thank you again for attending and have a wonderful day.

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Heather de la Riva is the Managing Director of Outsourcing at Nonprofit HR and a member of the leadership team. Through her leadership, virtual outsourcing has become the fastest growing division at Nonprofit HR.

She has successfully led innovative and complex projects in performance management, workforce planning, process improvement across the HR lifecycle and numerous compliance audits. By developing strong partnerships with executive leaders, Heather has become a change agent in the transformation of many organization's cultures.

Read Heather's full bio.

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Danisha Martin is an executive recruiter and trusted advisor on the firm's retained executive search engagements. She conducts interviews with senior and executive level professionals and evaluates qualifications and "fit" with the client organizations' needs; prepares oral and written candidate assessments, presentations and recommendations; and manages the expectations of clients and candidates to ensure successful experiences. Danisha works collaboratively with Nonprofit HR's executive search practice leader on search strategy and business development initiatives.

Danisha has over 7 years of experience in search, talent acquisition, and human resources. Danisha has successfully managed the staffing and recruitment needs for clients ranging from small and mid-sized operations to Fortune 500 organizations in both the for-profit and nonprofit sectors. She is gifted in assessing talent, adept in relationship-building, and known for her professionalism and creative strategic approach.

Read Danisha's full bio.