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Automating Employee Onboarding

Guidelines and Ideas for Drastically Improving the Employee Experience with Automation

Table of Contents:

Onboarding Overview

The onboarding process sets the tone for the employee's relationship with their new company. If the process is disconnected and poorly organized, the employee's chances of success are greatly diminished while the chances of turnover increase.

Some numbers to consider as you read this eBook.

- 4% of employees quit after a bad first day (Bersin by Deloitte)
- 22% of turnover occurs in the first 45 days. (The Wynhurst Group)
- 90% of employees decide to stay within the first six months. (Aberdeen Group)
- 31% of people have quit a job within the first six months, with half of those coming in the first 3 months. (BambooHR)

## Strong Employee Onboarding is Critical to Any Business

Employee onboarding is the company's first real impression of the new employee and their first real impression of the company. Hopefully they've come in with a good impression of the company's brand via social media, recruiting events and other online sources, but this is really where the rubber meets the road.

The onboarding process sets the tone for the employee's relationship with their new company. If the process is disconnected and poorly organized, the employee starts to wonder how committed the company is to their well-being, much less their ongoing growth and nurturing. You've probably experienced a poor onboarding process yourself. How did the first few days feel? Lost? Unappreciated? Unprepared? You may have even thought "What have I gotten myself into?"

Also think about the impact of poor onboarding on the company. In addition to the morale boost (and the subsequent productivity boost) proper onboarding can reduce time wasted during the employee's first week by both the employee and their supervisor. IDC reported that employers lose $37 Billion each year because new employees don't understand their jobs (See: "$37 billion: Counting the Cost of Employee Misunderstanding"). Other reports indicate individual companies losing $10,000 a year to poor onboarding programs (or a lack of any program).

Needless to say, employee onboarding programs are critical to an organization's employee satisfaction and retention goals.
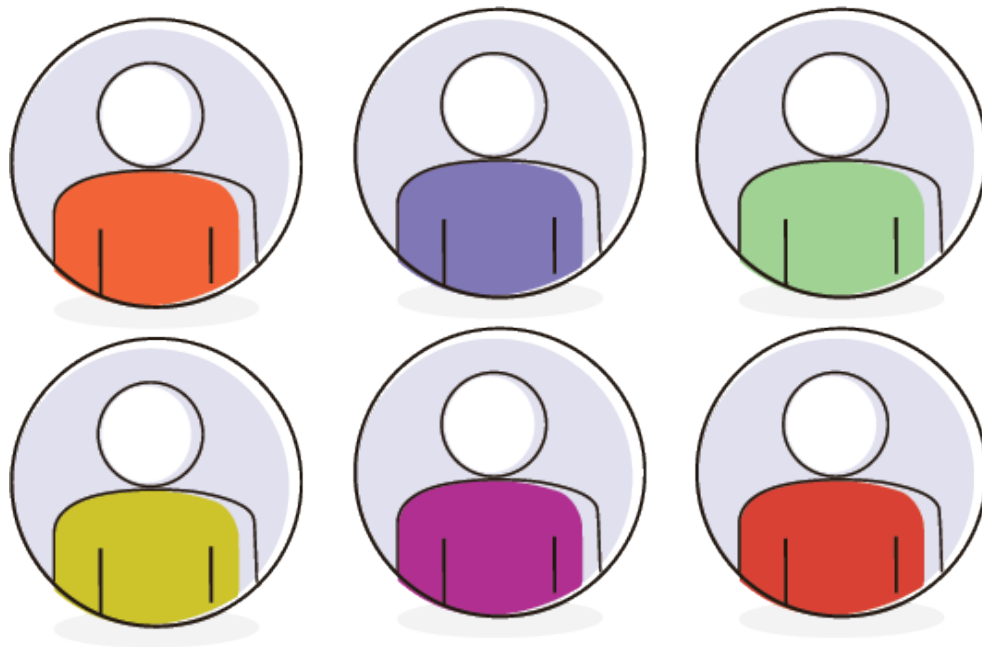
Planning the Onboarding Process

Onboarding starts before the first day begins. Think about the things that have to happen before the employee walks in the door and how soon it needs to happen. Better to overthink while brainstorming and cut down the list later. How long does each event/request typically take? Back out the dates and provide padding. We'll explore some ideas later in this article to help kick-start your thinking. Also, not every element of an onboarding plan can or should be automated. However, at this point, it's best to think through every task, touchpoint, resource and responsibility in the process.

Most people want their own manager to be the "face" of their onboarding process. In fact, all hiring managers should be trained fully in the onboarding process and be provided standardized onboarding plans.

> "I truly believe that onboarding is an art. Each new employee brings with them a potential to achieve and succeed. To lose the energy of a new hire through poor onboarding is an opportunity lost."-Sarah Wetzel, Director of Human Resources at engage:BDR

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These plans can include everything from templates for objectives, expectations, job functions, etc. to how to behave with the employee during their integration into their new team. For instance, being present and available, facilitating team lunches and introductions, etc.

Some ideas for information to include in a plan:

→ How much paperwork can you handle online and have completed before the employee starts their first day?

→ Quick Reference Guides for systems the employee will be using to supplement the full training on the system.

→ Maps of the workplace and key locations (copier, printer, cafeteria, departments, restrooms/ door codes, etc.)

→ Key features of the phone system. Probably not surprisingly, most employees don't know how to transfer a call properly (just ask someone at random).

→ Assign a buddy- give them someone who is a peer to ask general questions

→ Stay in regular contact during the 2 week "notice" period- this is when people are in doubt with their new choice and need to feel welcome/wanted

→ Provide a "Welcome Package" with company gear to help them identify with the company brand.

03 | Automating Onboarding

Automating the request process for <u>onboarding new employees</u> is becoming more and more affordable and practical. Customized portals and workflows can be built to handle request/information intake (forms) and the subsequent routing of the information around the organization. The portal can be leveraged by the new employee's manager, the employee him/herself or HR, depending on what part of the process they handle.

Requests (hardware, network access, benefit forms, furniture, etc.) that are typically part of the onboarding process can then be initiated online, with IT, Finance, Facilities and other departments getting notifications and approvals in an automated fashion instead of relying on paperwork, phone calls and back and forth emails/instant messages.

> "Analytics are increasingly being used to help improve employee experience and wellbeing through personalizing services such as onboarding and learning."-David Green, Global Director of IBM's People Analytics

In addition, providing new employees with an online portal gives them a centralized location to track the status of the process and keep up-to-date on when requests will be fulfilled. This type of request portal becomes their window into the company and promotes consistency and stability as they acclimate to their new company.

Potential onboarding processes to automate

Pre-hire

- Position request form

- Recruitment and application process

- Internal referrals

- Interview feedback and tracking

- Offer tracking

- Background checks

- Security badge request

- Business card ordering

During Hire

- New hire information gathering

- IT Setup form (hardware, software, network access)

- Policy/mission review and acknowledgement

Post-Hire

- A survey of their onboarding process

- Employee information change

- Personnel action

- Hardware and software requests

- Leave requests

- Expense and travel requests

- Performance reviews and acknowledgment

- Goals tracking

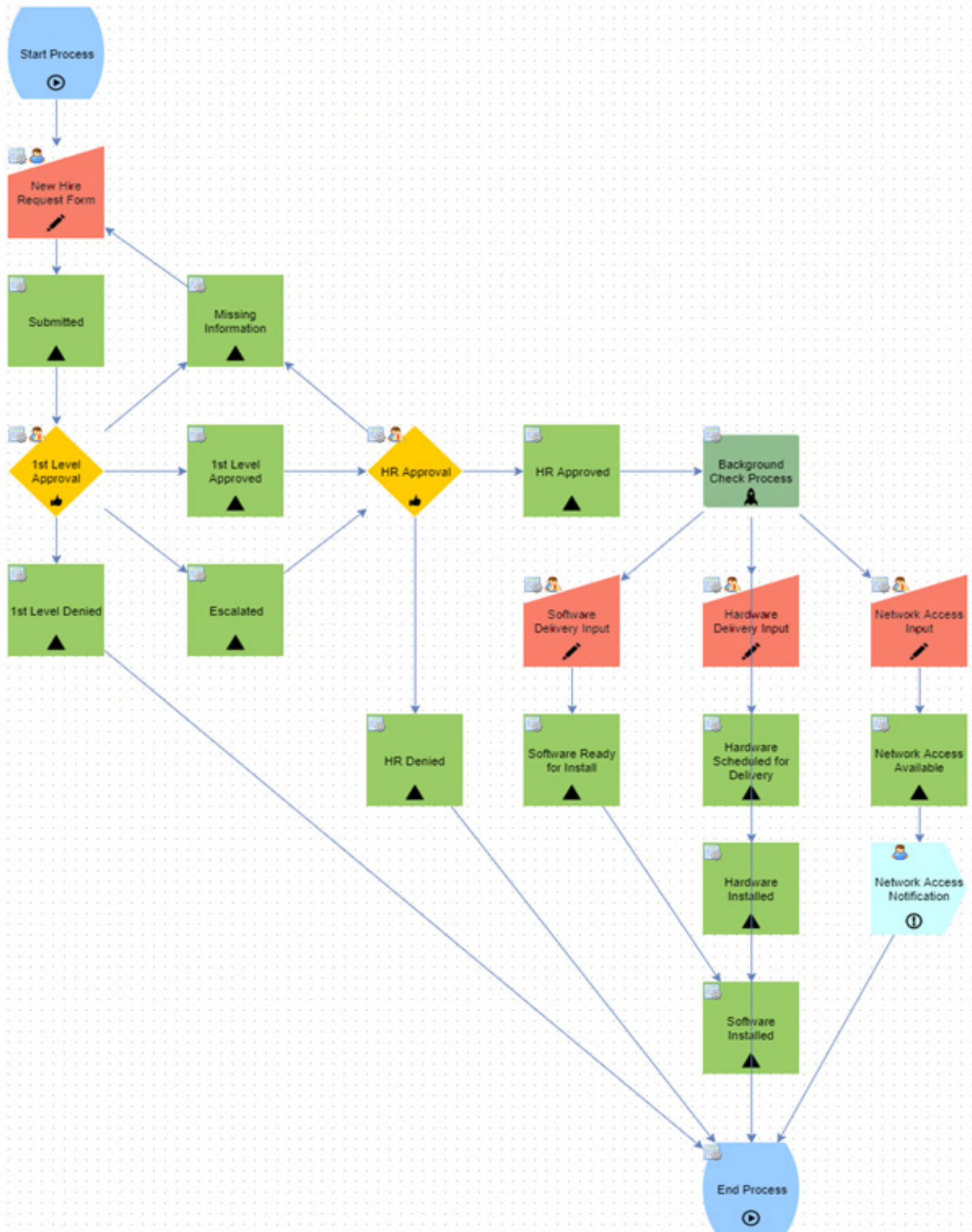- Peer and team recognitions and awards
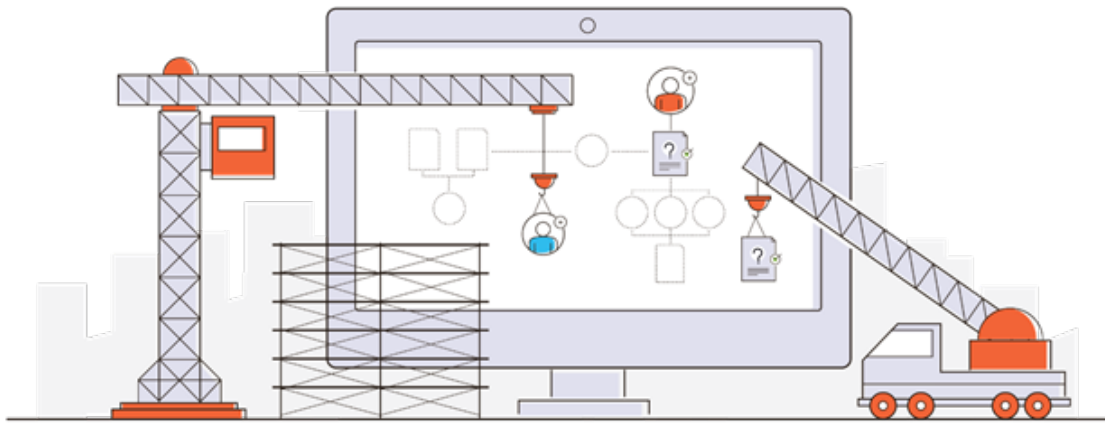
New Hire Automation Example

The degree to which you automate your onboarding process is, obviously, entirely up to your organization's needs. Let's say you want to automate the New Hire Process from the point where a manager selects a winning candidate to the point that candidate is approved and receives the appropriate technology to start work. It's a fairly simple workflow example but it will show you how a workflow automation solution can be set up to manage what was previously a very manual process.

On the following page you'll see the entire process we described laid out in a series of tasks to be completed. There are several forms that will need to be filled out online, approvals that need to be made, and actions taken that need to be confirmed within the system.

A workflow automation system will provide the tools to:

- Lay out the process as needed.

- Build the required forms.

- Configure the alerts and reminders required.

- Set up the appropriate reporting and tracking.

Start Process
▶

New Hire Request Form
✏

Submitted
▲

Missing Information
▲

1st Level Approval
👍

1st Level Approved
▲

HR Approval
👍

HR Approved
▲

Background Check Process

1st Level Denied
▲

Escalated
▲

HR Denied
▲

Software Delivery Input
✏

Hardware Delivery Input
✏

Network Access Input
✏

Software Ready for Install
▲

Hardware Scheduled for Delivery
▲

Network Access Available
▲

Hardware Installed
▲

Network Access Notification
①

## Software Installed
▲

End Process
▶

Section

04

Tips When Automating Onboarding

These tips refer to the process of onboarding new employees. Many different staff members may be involved and you want to keep the process moving expediently and accurately for the new employee.

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10

Online Forms

- Pre-fill online employee forms with known information. Don't make employees re-type.

- Don't overwhelm the new employee with too many questions on one form. Break them up if needed.

- Consider pre-checking items based on department, level, etc. For instance, all salespeople get mobile phones, all marketing staff get access to marketing software, etc.

- Break up longer forms into multiple pages to reduce anxiety but provide a clear explanation of where they are in the process.
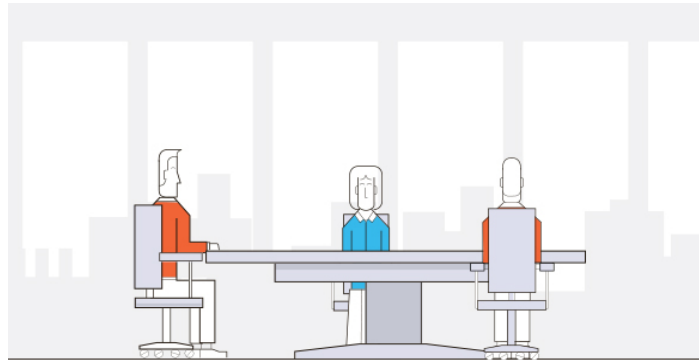
Processes

- Make internal process expectations known. If staff are expected to complete onboarding tasks in a set amount of time, make sure they know.

- Keep contact lists up-to-date. New employees have a lot of questions, make sure they contact the right person for what they need.

- Provide a visual representation for the employee that shows ALL the tasks involved in their onboarding and where they are in the process.

- Use group approvals/tasks, rather than specific individuals whenever possible. This ensures someone is available.

- Plan ahead for integration into other applications/systems.

- Remember the process is fluid. Continuously improve it based on performance.

- Think in advance about privacy and security. What information needs to be available only to certain people?

- Store social security numbers, passwords, drivers license numbers, etc. encrypted.

- Use role-based security levels to ensure certain information is only available to the right people.
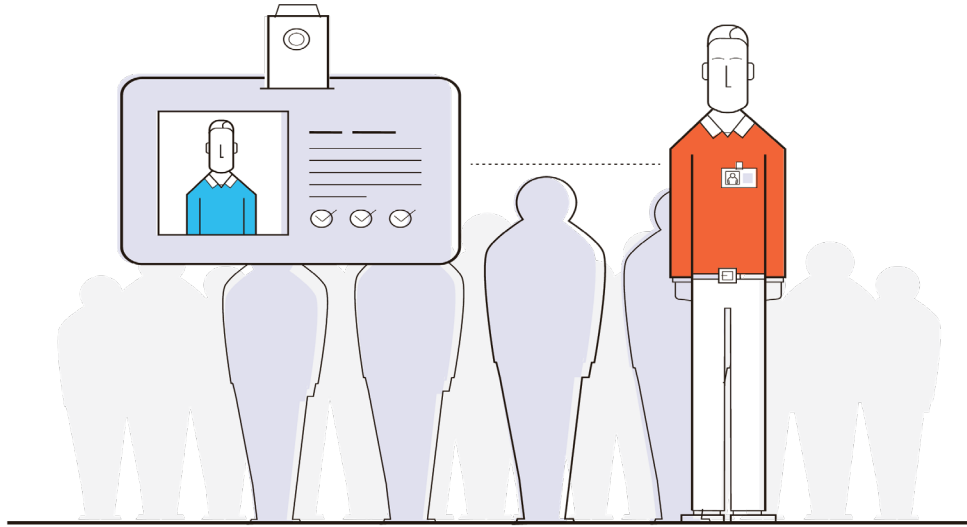
05 Offboarding

A final note to consider is at the other end of the onboarding process. What happens when an employee is terminated? A large number of organizations handle employee offboarding, or "termination procedures," through loose, manual processes like emails, phone calls and private conversations.

Now consider these (real) scenarios:

- A computer technician at a large publishing company deliberately caused several of the publisher's network servers to crash as retribution for his termination. All of the information on the servers was permanently erased and could not be restored.The publisher was forced to shut down its New York office for two days and lost in excess of $100,000.

- Just after he was fired, a former construction company office worker changed the company's login and password without telling anyone. This gave the terminated employee complete control of the construction company's website and email system.

- A contract worker at a large automaker was fired and later that evening the worker logged in to their network, trashed their supplier website and stole proprietary trade secrets. In fact, the worker was logged in until about 6:30 am the next day.

Obviously, these are all worst-case scenarios but all it takes is one poorly-managed offboarding procedure to cause serious disruption and financial loss to a business.

In fact, Sarbanes-Oxley states that "Terminated employees should have their access promptly removed. A process should exist to ensure that account administrators are notified in a timely manner of employee terminations."

And yet, despite the mounting risks of not properly offboarding employees surveys indicate many organizations are leaving gaps in their processes.

- A survey by security firm Cyber-Ark that found "88 percent of information technology workers would take sensitive data with them or abscond with company passwords if they were fired".

- In another survey: "More than 13% of respondents can still access a previous employers' systems using their old credentials. A surprising percentage can still gain access into two, or even more, ex-employers' systems."

So far we've only spoken about the security risks of a manual offbaording process, but these kinds of security breaches are just the most obvious risks companies need to mitigate. There are many other parts of the offboarding process that should be part of an automated process to prevent lapses and ensure policy consistency.

- Ensure performance evaluations, disciplinary action forms, attendance sheets, etc. are in order.

- Avoid potential lawsuits by ensuring that the compliant procedures are followed and documented across all locations.

- Decomissioning of access cards.

- Identification and return of company property.

- Provide access to local, network and cloud-based files as well as email for the former employee's supervisor.

- Ensure receipt of paperwork (non-disclosure, etc.)

- Conduct exit interview or surveys.

- Confirm that information about insurance continuation (COBRA), retirement fund withdrawals, and other benefit matters were discussed.

- Notification of stakeholders (IT, Finance, leadership, etc.)

- Retention of certain technological resources, data, and logs in the event that the former employee or company itself decides to pursue litigation.

- Ensuring that terminated employees no longer collect wages or benefits past their date of separation.

Managing the offboarding process in an automated way becomes even more critical in industries where the HR staff is often not onsite to oversee the offboarding process. For instance businesses with multiple office locations but a centrally-located HR team. Often the process is left completely to the terminating manager or office manager, who may not be as versed in the process or as sensitive to the risks of poor offboarding as if HR personnel were on hand.

Ultimately, the benefits of automated the offboarding process are numerous and, combined with a thoughtful, automated onboarding process, can ensure consistency, accuracy and compliance for the employee lifecycle.
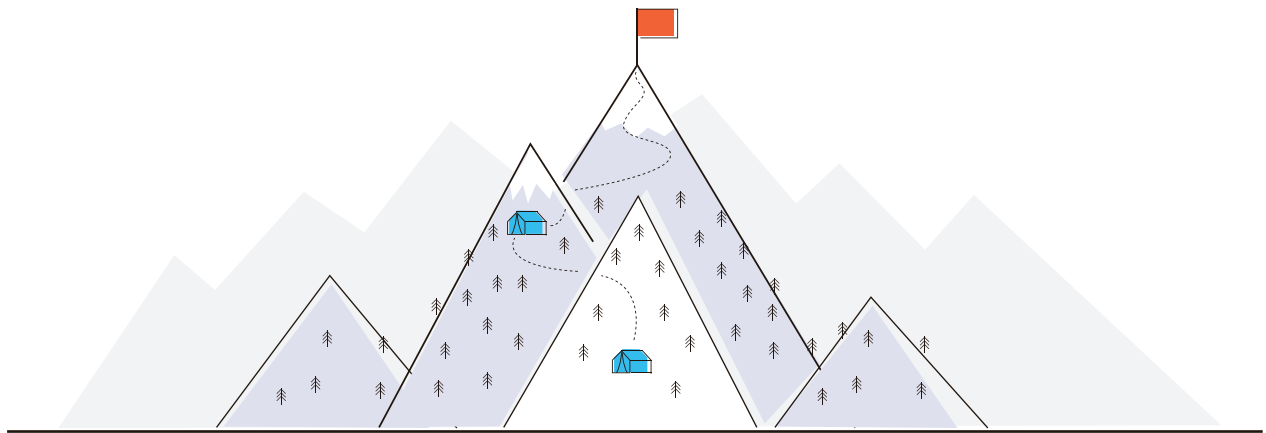
Section
06

About
Integrify

Our Mission

For over ten years, Integrify has been a leader in request and workflow management. Launched in 2001, with headquarters in Chicago, we've built a reputation for creating software with the customer in mind. Users value simplicity and integration. That has always been the focus of our product. Rapid distribution, broad scalability, and high ROI are goals that we are constantly reaching, only to again set the bar even higher.

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We believe that our job is to ensure customer success by helping them to do more with more efficiency. We are constantly innovating to provide compelling solutions that are simple to use and adopt. We believe that we can work together with customers to build solutions to buck the status quo and make organizations more productive.

The Integrify Automation Platform Advantage

- Costs are reduced and employee productivity is increased by reducing approval cycles, minimizing processing errors and streamlining business processes.

- An intuitive Web-based interface reduces the learning curve and extends the administrative capabilities to any area within a company.

- Minimal training is required for using the system so employees can begin using the processes immediately, and business analysts can quickly deploy and modify business processes without understanding programming or database systems.

- Integrify leverages existing systems, extending their reach to provide error-free data collection, tracking, reporting, and visibility.

- Integrify can handle many types of workflow processes at either the department or enterprise level and will manage requests and approvals in HR, IT, Finance, or any other area within a company.

Want to discuss your workflow management needs? We'd love to talk!

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