



# THE DEFINITIVE GUIDE TO DELIVERING AN AMAZING ONBOARDING EXPERIENCE

# Why A Good Onboarding Experience Matters: An Introduction

They say first impressions are everything, and the numbers don't lie. According to a Brandon Hall Group study, "Organizations with a strong onboarding process improve new hire retention by 82% and productivity by over 70%."<sup>1</sup> This substantial increase in productivity and decrease in turnover (and related recruiting costs) translate into real, tangible business benefits. On the flip side, a bad onboarding experience leads to almost immediate disengagement and higher turnover. This turnover not only impacts productivity, but also can significantly affect your **employer branding**, as employees who leave your company share their negative experiences with others on social media and review sites like Glassdoor. To get the most out of your workforce, retain employees, and maintain a positive employer brand, you need an **amazing onboarding experience**.

And yet, creating an impactful onboarding experience can be very hard to do. There are a lot of moving pieces in the onboarding process and it can be challenging to manage it all. Many parts of the onboarding process tend to be manually performed by HR, so it's easy to miss steps or make mistakes. And manual tasks often have a **long turnaround time**, with candidates and employees having little transparency into where they are in the onboarding process. HR may also need to access **multiple systems** and work cross-functionally to complete steps with other stakeholders, such as hiring managers, HRBPs, IT, Finance, and more. Further, there is not only a lot of paperwork for employees to complete, but also the paperwork requirements will vary by region, by role, by employment agreement type... it's a lot for HR to manage! While HR is scrambling under the workload, particularly in high turnover industries, candidates and employees are anxiously waiting.



But with companies investing heavily in a great candidate experience, and cost per hire averaging \$4,000<sup>2</sup>, can you afford to drop the ball when the employee actually joins your organization? Companies seeking to develop an amazing onboarding experience use an **HR Service Delivery platform** to guide pre-hires and new hires through the process and automate back-end, manual work for HR. By integrating with the ATS, HRIS, LMS, and any other systems that are a part of onboarding, it's simple for HR to create or edit an onboarding process that is **personalized** based on employee attributes.

<sup>1</sup>[The True Cost of a Bad Hire, Brandon Hall Group 2015](#)

<sup>2</sup>[Bersin 2015 Talent Acquisition Fact Book](#)

Many organizations use their ATS or HRIS to manage some onboarding transactions, but they find there are still manual steps. These organizations can take advantage of an HR Service Delivery platform to span the different systems and **automate the remaining manual pieces**, giving HR a better way to manage the end-to-end process. HR can provide information to pre-hires or new hires through a personalized **onboarding portal**, and can publish a **series of tasks** for the new hire, manager, HR specialists, and even IT professionals to complete. And any **documents generated** during onboarding, regardless of the system where it originates, will automatically flow into an employee file – providing HR with a view into the employee and ensuring compliance with local records requirements.

In this eBook we'll explore how you can use an HR Service Delivery platform to provide an awesome onboarding experience to your new hires, enhancing the employee experience, improving engagement, and increasing retention.



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# Welcome Employees with a Personalized Process

Approaching onboarding as a one-size-fits-all process is one of the easiest mistakes to make. Different employees will need a **different process** depending on their employment agreement type – for example you may require your hourly workers to take different courses in your LMS than your full-time salaried employees. Employees in different locations may need different processes too. For example employees in the US must fill out an I-9 form, but this is not required in other countries. Depending on who the employee is, there will be variations in the onboarding process. (Note: there are ways to standardize the onboarding process even at a global level - and huge benefits of standardization - which we'll discuss later.)

With an HR Service Delivery platform, you can **personalize the experience** for each employee, giving them a higher level of service – on par with the modern digital experiences they already encounter daily. In an onboarding portal personalized based on employee attributes in the ATS or HRIS, you can provide welcome content, like videos or notifications, so new hires feel excited to be a part of the team and are engaged early.

The HR Service Delivery platform will also walk your employees through the different steps required, whether it's taking specific onboarding courses in your LMS, setting up different accounts, or filling out paperwork via electronic forms. They will have **transparency** as to where they are in the process; they'll know what comes next, they'll see what outstanding tasks they have, and they can view where HR is in the process.

By centralizing onboarding steps into a tasklist in the portal, your employees will have **one place to go for all of their onboarding information, tasks, and questions**. If there are questions they can't find answers to in the portal, your new hires can easily enter them through the portal and the question will be automatically routed to the right person in HR to manage the question. With a personalized experience, you also ensure that you **comply with local regulations**, including any specific legal forms or documentation required for that employee.

Through a cloud-based SaaS delivery model, your HR teams and your employees can access the platform from anywhere, on any device. So, you can provide this highly personalized process regardless of where your HR teams are located, whether in a shared services model or with local HR.

When you guide employees through their very first HR process in the organization – personalized for them – they will feel cared for and be excited to jump right in. They will understand that you want them to join their organization and that you are committed to their success. Your new hires will also understand your commitment to giving your employees the best tools on the market. **You will have given everything they need in order to hit the ground running**. This positive experience will translate into higher levels of engagement in their first weeks with you, a critical time period.

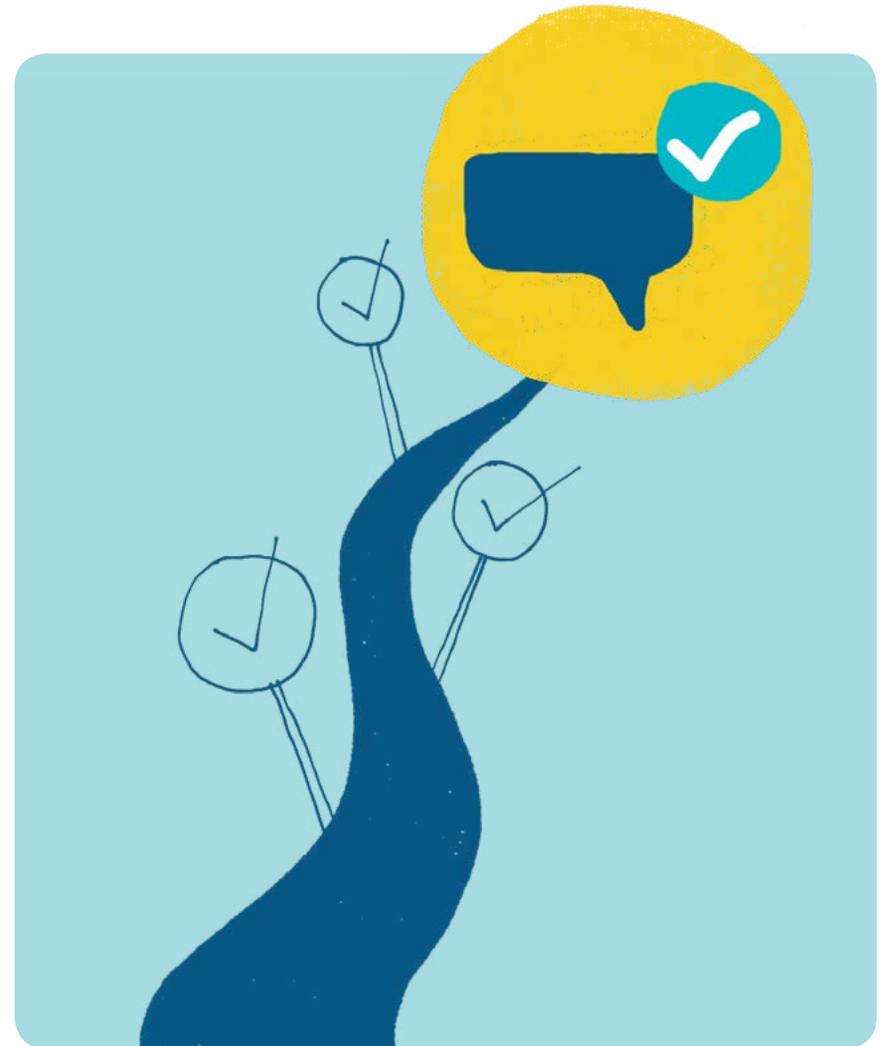


# Don't Wait For Day 1

Preboarding is a way to give your employees a faster start when they finally arrive for their first day of work. **You don't have to wait for an employee to start to begin the onboarding process.** Can you start the new hire paperwork process? Can you order their telephone and computer in advance? Can you alert their new manager of the start date? Can you ensure their workspace is set up and ready to go before they arrive?

Organizations in certain industries, like healthcare, can greatly benefit by having all of this pre-work out of the way before the employee even arrives. In these special cases, certain paperwork must be completed before the employee can begin to work. These organizations lose **valuable time and money** if the employee is not able to work when they first show up to work. By completing preboarding steps in advance, employees can focus on their new job immediately and become productive much faster.

With an HR Service Delivery platform, you can initiate the onboarding process before the new hire is even entered in the HRIS. In fact, data from the ATS can trigger the process in the HR Service Delivery platform, and you can automate the creation of the employee in the HRIS as one of the steps of the process. Through the platform, pre-hires are provided with access to a personalized **preboarding portal** in advance of their arrival with content such as "What to Know On Your First Day" and with forms to complete in advance. When they show up for Day 1, not only will they be able to start working right away, but they will also feel comfortable working with you from the outset.



# Move With Speed

Generating employment agreements, ensuring work authorization compliance, notifying HRBPs and new managers of a new hire, updating the HRIS and payroll – the administrative tasks required to onboard a new hire can pile up quickly. **HR is buried with manual, repetitive tasks**, often entering the same information into multiple systems. Time has to be allocated for doublechecking for errors – the cost of noncompliance is high, and it's critical to have an error-free experience for the employee. HR also has to communicate back and forth with pre hires and new hires in order to provide any transparency into the process.

In order to provide that great experience, HR needs to move nimbly and quickly. An HR Service Delivery platform **reduces the manual work** by automating the onboarding process. HR no longer has to look up which steps a certain employee needs to go through. They don't need to manually email other stakeholders to notify them of tasks. **Dynamic, logic-based documents are generated through the platform**, ensuring compliance with corporate policy and saving HR valuable time. All new hire files are centralized into an **employee file management solution**, so it's easy to access files as well as ensure documents are completed. The employee has **self-service capabilities** through the onboarding portal, reducing the number of questions HR needs to answer.

You might be using your ATS or HRIS for onboarding today, but even if so, you probably still have manual steps. An HR Service Delivery platform can reach across these systems and help you **automate the remaining manual pieces**. Instead of just managing the transactions in your HRIS, the HR Service Delivery platform can also assign tasks related to your LMS or your benefits provider. With an HR Service Delivery platform you can also generate simple documents, like an electronic I-9 form, or more complex documents, like employment agreements which rely on complex logic to **generate a dynamic document from a template**. Of course, any document generated during onboarding, regardless of the system where it's generated, will flow automatically into the **employee file**.

And HR can quickly and easily keep up with any changes to local regulations and update the process on their own **without having to hard code anything**. You will spend less time administering the tactical onboarding process and more time focused on the bigger picture – like finding strategic ways to enhance the process.



# Standardize a Global Process While Supporting Local Compliance



Organizations can benefit from having standard global processes – it’s easier for HR to manage, especially in a shared services environment, and it ensures your employees have the same experience. For compliance, it’s also important to be able to prove that you have certain standard operating procedures (SOPs) in place. However, organizations will always be required to comply with **local** regulations or face massive repercussions. For example, employees in the US must fill out an I-9 form.

Employees in France who opt-in for digital payslips must be able to access these for 50 years. And so on.

With an HR Service Delivery platform, you can create a standardized global process, and then build out **workflows that account for the local requirements** as well. Because of the data available through the HRIS integration, the process will automatically be localized for the employee to help ensure compliance.

Unfortunately, once you’ve created these localized processes, your work isn’t done. Laws and regulations change constantly and you’ll want to move nimbly to ensure that your forms and processes are updated. For example, the I-9 form in the US changed in early 2017 and employers had just a few short weeks to update the form and ensure any new employees filled out the newest version. An HR Service Delivery platform makes it easy for HR to make updates to forms, processes, and workflows on their own – **no coding necessary**.

And you’ll need a way to prove that employees have filled out the right forms, as with the I-9 example. An HR Service Delivery platform gives you the ability to easily share files with a 3<sup>rd</sup> party in a shared folder. The employee files are properly tagged to show which version each employee completed. An HR Service Delivery platform also gives you reporting capabilities, so you can see where you’re missing a document, or what documents you have that are about to expire (like a nursing certification), which allows you to stay ahead of an audit.

# Optimize the Onboarding Process

Beyond reports to help you ensure HR document compliance, it's important that you have optics into the process itself. Can you see how quickly employees move through the process? Are there steps that are tripping up your new hires? What is your average preboarding time - and what outliers are impacting that average?

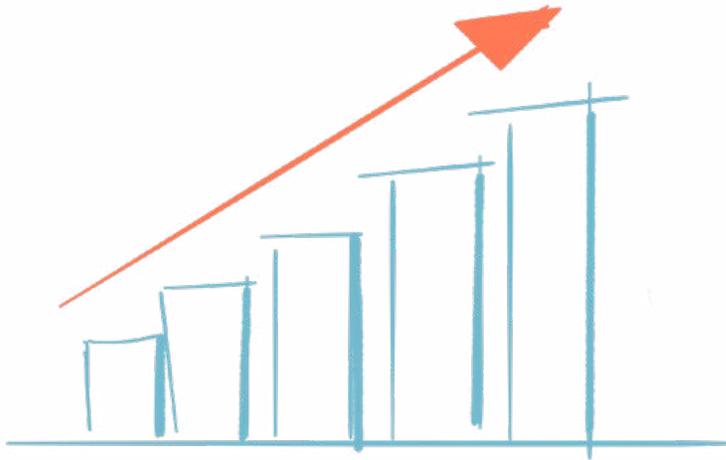
If you have the right visibility, you can enact change and streamline the process to provide a better onboarding experience. You can start to think about how to improve your KPIs, using data to inform your decisions. By identifying outliers and bottlenecks, you can take the steps to improve. For example, maybe you need to add an article to the knowledgebase in the onboarding portal to explain a step a little further. Or maybe you need to share different content from the beginning. Perhaps you need to implement some training for people managers.

You can also find bottlenecks on the HR side. Maybe you want to reduce onboarding time, and you are asking your HR team to move faster. However, it's really the hiring manager acknowledgement that's holding you up. This kind of visibility can help you really understand what's going on in the process and can help you optimize.

With analytics, an HR Service Delivery platform can provide you with easy-to-read dashboards so you can quickly spot opportunities for improvement. By keeping your finger on the pulse of the onboarding process, you can continuously improve the onboarding experience, increasing employee retention, satisfaction, and productivity.



# Don't Forget Your Other Processes!



Onboarding is a messy process that has the potential to be simplified, smoothed, and improved with technology. But it's not the only process that can be difficult to manage. Other worker transitions, like **internal transfers or offboarding**, have many of the same requirements as onboarding. And other HR processes might have transactions that can be managed in your systems, like the HRIS, but still require some amount of manual steps.

Onboarding is just one of these processes that an HR Service Delivery platform can support. An HR Service Delivery platform automates any people-based process that you can't manage in your existing systems. These back-end processes span your systems and reduce manual work to help you manage the entire end-to-end process.

This can be as simple as **tuition reimbursement** or as complex as an **international transfer**, where you want to provide the employee with a video about their new location, notify the new office to get a workspace ready, ensure the employee's work visa is in place, ask the employee to take a language course in the LMS, and more. And any paperwork generated as part of the process should automatically flow into the **employee's digital file**.

Once your processes are managed and automated as much as possible, you can begin to **measure results**. You can see where your employees and your HR teams are spending the majority of their time and identify opportunities for streamlining. When your processes are smooth, your **HR teams can run faster** and provide a **better employee experience**.

# Conclusion: Increase Employee Satisfaction, Retention, and Productivity

Onboarding has a direct impact on your employees at the very beginning of a job, and the echoes reverberate throughout the employee lifecycle. A positive experience for new hires can set the course for the rest of their time with your organization. And you can achieve real business results by providing a great experience straight out of the gate.

When your onboarding process is streamlined and supported with state-of-the-art technology, you increase employee satisfaction and retention, as well as productivity from both HR employees and new hires. You've already invested in finding the right candidates. Investing in your onboarding process – potentially even more critical to your business – is a guaranteed worthwhile venture.





# PeopleDoc by Ultimate Software

PeopleDoc by Ultimate Software is committed to putting people first. The PeopleDoc HR Service Delivery platform helps HR teams upgrade the employee experience, improve HR agility, and ease compliance management. PeopleDoc global cloud solutions provide employee case management, knowledgebase, process automation, employee file management, and eVault capabilities.

Delivered 100% software as a service, PeopleDoc solutions integrate with a wide range of HR and enterprise systems and can be implemented in 8–12 weeks. PeopleDoc is part of Ultimate Software, a leading global provider of cloud-based human capital management solutions. Known for its “People First” culture, Ultimate has ranked in the top 25 on Fortune’s U.S.-based *100 Best Companies to Work For* list since 2012, and #1 on Fortune’s *Best Workplaces in Technology* list, in the “Large Companies” category, since 2016. Ultimate employs more than 5,200 professionals and serves approximately 6,100 customers worldwide.

More information about PeopleDoc by Ultimate Software can be found at [www.people-doc.com](http://www.people-doc.com).

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