



NEXT PRACTICE

Onboarding

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Session Overview



1

Why does onboarding matter?



2

Where are we going wrong?



3

Tactics to elevate the onboarding experience



4

Getting started



1

Why does onboarding matter?

Why do you do onboarding in your organization?

- a. To deliver a great employee experience
- b. To ensure new employees are set up for success
- c. To boost engagement of new starts
- d. To drive productivity and performance
- e. To deliver on the employer brand promise



The impact of onboarding

#1 | Reduces turnover costs

#2 | Accelerates time-to-productivity

#3 | Enhances engagement and satisfaction

#4 | Influences long-term commitment

#5 | Builds brand advocacy

82% more likely to remain for more than 3 years
(Glassdoor)

60% faster to reach productivity
(Brandon Hall Group)

2.6 x more likely to be engaged
(Gallup)

31% leave within the first 6 months
(Digitate)

60% higher employee referrals
(Glassdoor)



2

Where are we going wrong?

How is onboarding experienced?



joltjames123 · 3y ago ·

Took me like a month to get onboarded for a 3 month internship and then they didnt have anything important for me to do

49 Upvote Downvote Reply Award Share ...



neonreplica · 3y ago ·

I'm on my 3rd full-time real dev job and I've never had an "on-boarding" or mentor

Every time I've just had to play "obsessed detective" and study the code on my own and strategically bother various colleagues when I get stuck

14 Upvote Downvote Reply Award Share ...

It took 2 months to get a corporate email address. And that was fast from what people told me. My job was largely email based. I learned other stuff in the meantime and used a personal email address when I REALLY needed to send email. Getting access to the databases, that was 6 months to a year.

The best part, I worked at a business process outsourcing company. We told people how to be more efficient and effective, but we didn't eat our own dog food.

329 views · View 1 upvote · Answer requested by Ethan Jennerich

1 of 3 answers

Remote onboarding.

To login, you need to use the company provided laptop.

The provided password doesn't work.

To open a ticket, you need to use the company email, which only works on the company laptop.

After talking to many people to finally be able to open a ticket, you ask to send the email to the personal email. The first email goes there...

Then, when 3 days later you can connect to the company email, you see an email that says: Do you still need any help with issue X?

Then another email: As you didn't say anything, I am closing this ticket as problem solved.

Then, when I finally start the real on... [\(more\)](#)

Upvote Downvote Reply ...

I took a job that I regretted very quickly. Among other things, I had to go to the storage building to "pick out" my desk, then find a janitor to move it. No one gave me any instructions or guidance or training, I was completely on my own.

Upvote Downvote Reply ...

What are your biggest challenges in onboarding?

- a. There is so much admin to do that it is overwhelming
- b. I struggle to coordinate all the various parts of the process
- c. Our processes are unstructured and difficult to repeat
- d. I am not sure if our onboarding process is focused on the right things
- e. We don't have technology to support the onboarding process



What makes the onboarding experience fail?

Multiple role players shape the experience

Capacity to facilitate the experience

Administrative and operational burden

Disjointedness of the experience

One-size-fits-all approach

Little focus on connection

Neglecting support beyond 90 days

Failure to gather feedback



3

Tactics to elevate the onboarding experience

How can we elevate the onboarding approach?

Tactic #1

Applying EX design methodology to the onboarding process

Tactic #2

Balancing efficiencies with personalization through technology

Tactic #3

Establishing continuous listening mechanisms

Applying EX design methodology to the onboarding process

What does it entail and why is it relevant?

- ❑ Designing outside-in
- ❑ Understanding specific (shared) needs
- ❑ Identifying moments that matter
- ❑ Defining role players, systems and processes

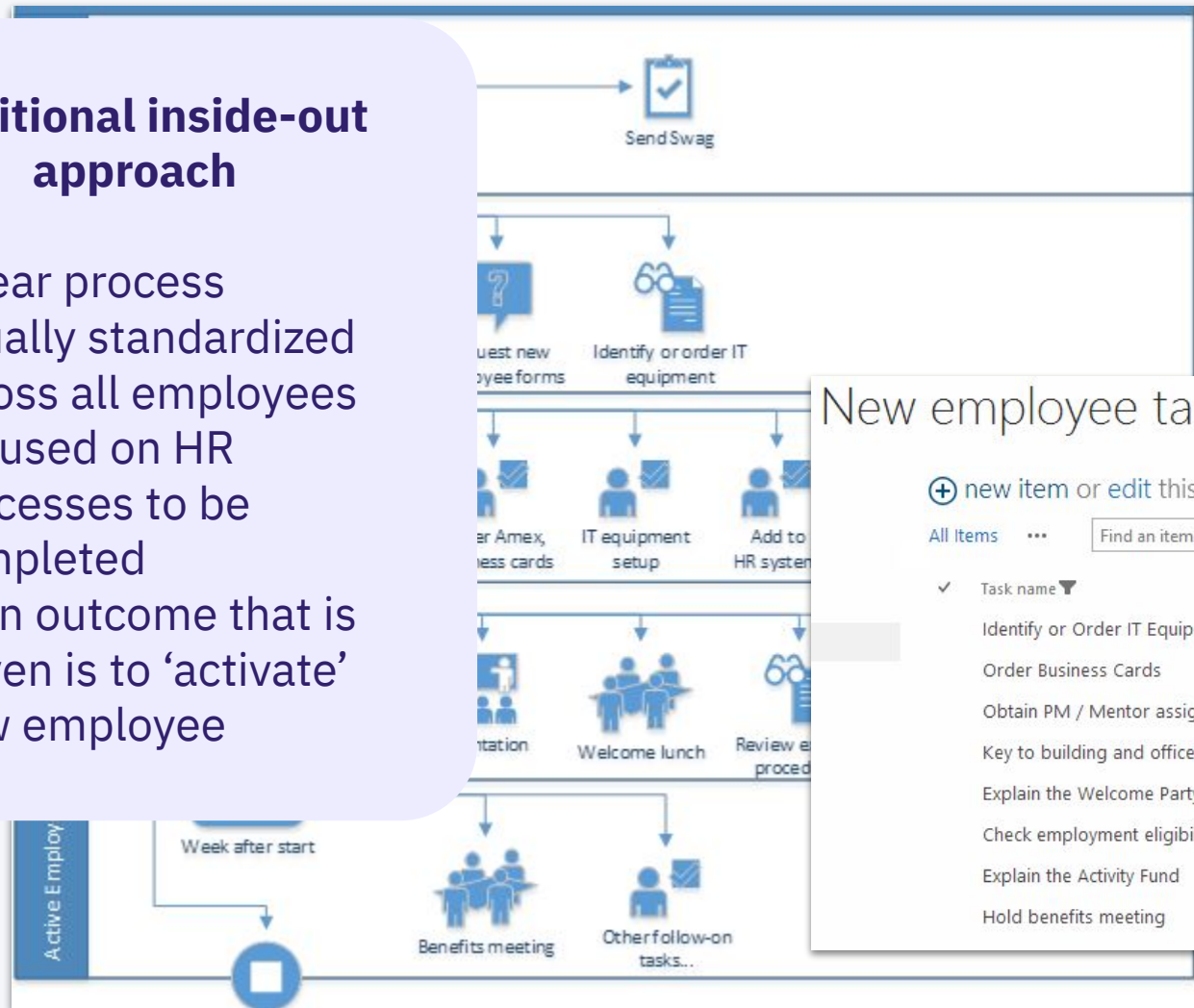


Tactic #1

Applying EX design methodology to the onboarding process

Traditional inside-out approach

- Linear process
- Usually standardized across all employees
- Focused on HR processes to be completed
- Main outcome that is driven is to 'activate' new employee



New employee tasks template ⓘ

⊕ new item or edit this list

All Items

...

Find an item



SAVE THIS VIEW

✓ Task name ▼	Assigned to	Relative due date ↑	Task priority	Active	Task Stage
Identify or Order IT Equipment	... Mark	-21		Yes	Pre-Hire
Order Business Cards	... Kathryn	-14		Yes	Onboarding
Obtain PM / Mentor assignments from Manager	... Deborah	-5		Yes	Onboarding
Key to building and office	... Courtney	-1		Yes	Onboarding
Explain the Welcome Party and give them some ideas	... Kathryn	2		Yes	Start week
Check employment eligibility via E-verify	... Deborah	2		Yes	Start week
Explain the Activity Fund	... Courtney	7		Yes	Start week
Hold benefits meeting	... Deborah	30		Yes	Active employee

Tactic #1

Applying EX design methodology to the onboarding process

EX driven outside-in approach

- Process based on moments that matter
- Flexibility to accommodate various needs
- Focused on experiences to deliver
- Main outcome that is driven is to 'enable' new employee



Applying EX design methodology to the onboarding process

BENEFITS

- Addresses the specific needs of real employees
- Shapes the desired experience
- Facilitates process development
- Enables technology investment decisions
- Identifies where we should listen
- Beyond the first 90 days



POTENTIAL PITFALLS

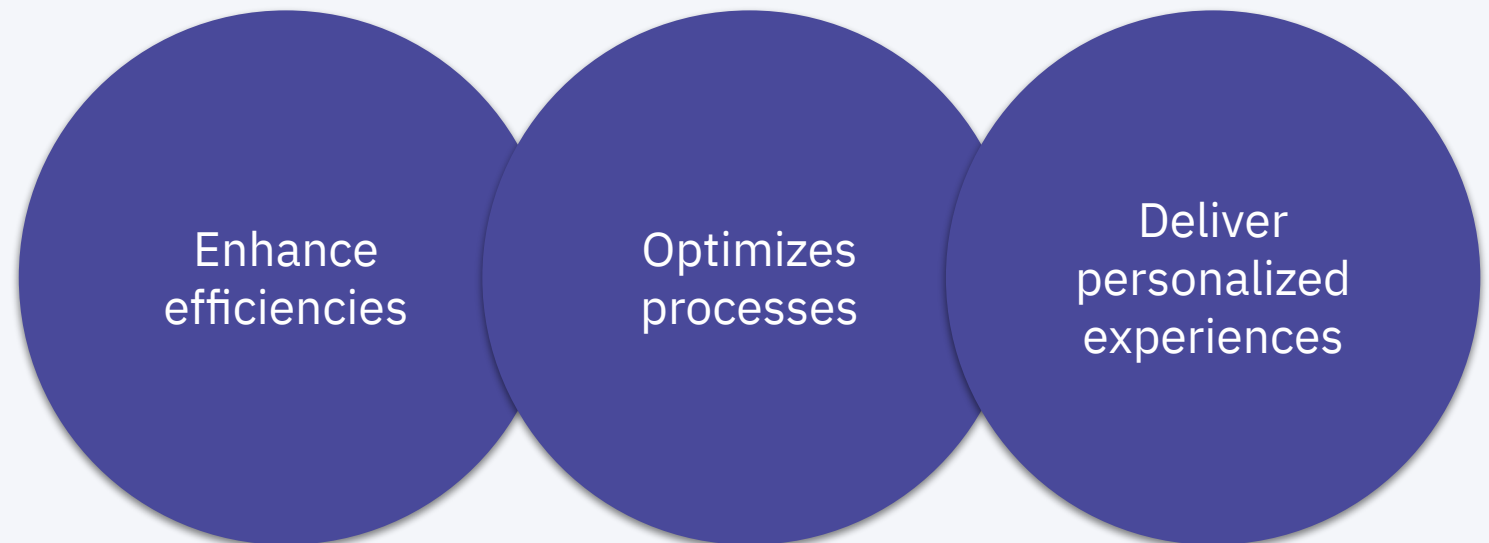
1. Balance standardization with personalization
2. Catering for too many needs
3. Risk of over-complicating if you do not follow a methodology

Balancing efficiencies with personalization through technology

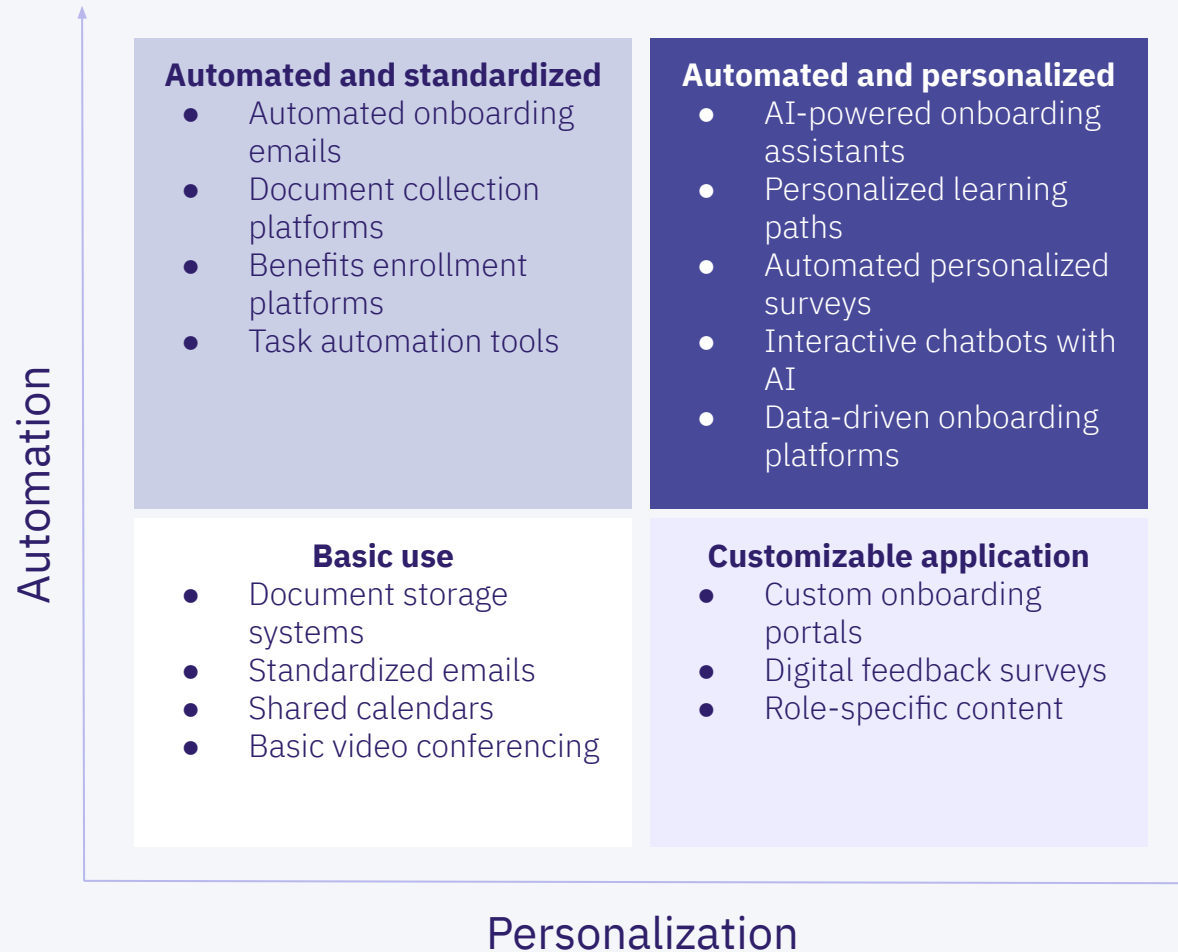
What does it entail and why is it relevant?

- ❑ Using technology to do the heavy lifting
- ❑ Leveraging technology to personalize the experience
- ❑ Tracking and managing the end-to-end experience

In onboarding, technology has to do one (or more) of these things:



Balancing efficiencies with personalization through technology



Considerations:

- What problem is technology solving?
- Which experiences should it enable?
- Where will it unlock most business value?
- What investment is required?

Tactic #2

Balancing efficiencies with personalization through technology

Automated and standardized

- Automated onboarding emails
- Document collection platforms
- Benefits enrollment platforms
- Task automation tools

Onboarding task example

Benefits Form Completion

The image displays two overlapping mobile device screens showing the Gusto benefits enrollment interface. The background screen is a tablet displaying the 'Benefits with Gusto' setup page. It includes a progress bar with five steps: 1. Employee information, 2. Build package, 3. Company info, 4. Confirm & apply (current step), and 5. Verify eligibility. The 'Coverage and enrollment details' section lists 'Eligible Enrollees' as 11 Employees. It details three benefit categories: Medical (with three plan options: Select Plus Silver BHCM, Select Plus Gold BHCI, and Select Plus Bronze HDHP BHBQ), Dental (Principal Dental Plan 4), and Vision (CA Beam VSP Choice Plan 2). At the bottom, it shows 'Estimated company costs' totaling \$3,596 per month, broken down into \$2,993 for Medical, \$501 for Dental, and \$102 for Vision. The foreground screen is a smartphone showing the 'Enroll in benefits' screen. It prompts the user to 'Choose your health plans' and provides 'Enroll or waive' buttons for Medical, Dental, Vision, and 401(k). A note at the bottom states 'Coverage for these benefits will begin on January 1st'.

Impact

Saves HR time, ensures accurate data, timely completion


Tactic #2

Balancing efficiencies with personalization through technology

Automated and standardized

- Automated onboarding emails
- Document collection platforms
- Benefits enrollment platforms
- Task automation tools


Onboarding task example


 Hide


Map your contact's journey

Guide each contact's journey by plotting the points they can visit along the way.
[Learn how to create a customer's journey](#)


Rules


 If / Else

 Wait

 Delay

Actions

 Send email

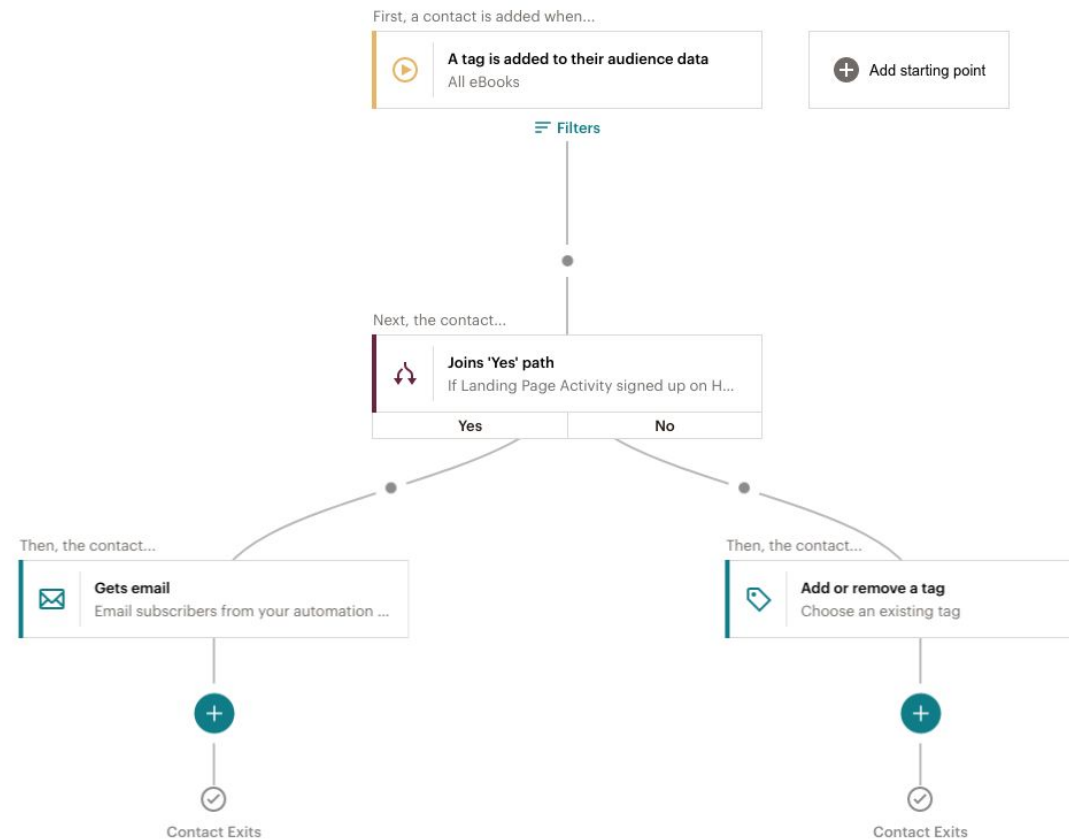
 Add or remove a tag

Technology you can use

What it does

Impact

engagement
manual work



Tactic #2

Balancing efficiencies with personalization through technology

Automated and standardized

- Automated onboarding emails
- Document collection platforms
- Benefits enrollment platforms
- Task automation tools

Onboarding task example

Technology you can use

What it does

Impact

Online coordination
ensures timely task
completion

Onboarding Project: Zoe Wong						
<div>+ Add Task</div> <div>Incomplete tasks Filter Sort Customize</div>						
#	Task name	Assignee	Due date	Timeframe	Owner	Actionable?
👉 Start here 👉						
✓	First day meeting with your manager 2 👤	Neel Rana	June 6	Day 1	Manager	Reference
✓	Attend day 1 welcome session	Zoe Wong	June 6	Day 1	New hire	Actionable
✓	Complete your profile in Asana 2 💬	Zoe Wong	June 7	Day 2	New hire	Actionable
👁️ HR, Benefits, and Payroll 👁️						
✓	Provide relevant employment documents	Zoe Wong	June 6	Day 1	New hire	Actionable
✓	Complete your new hire paperwork in our HRIS 3 🗨️	Dave Jung	June 7	Day 2	HR	Reference
✓	Reference documents	Zoe Wong	June 10	Day 5	New hire	Reference
✓	Review PTO policy 1 💬	Zoe Wong	June 13 – 17	Week 2	New hire	Actionable
👉 Communication 👉						
✓	Projects to favorite in Asana	Zoe Wong	June 7	Day 2	New hire	Actionable
✓	How to stay up to date with company announcements	Zoe Wong	June 20 – 24	Week 3	HR	Reference

Balancing efficiencies with personalization through technology

Automated and personalized

- **AI-powered onboarding assistants**
- Personalized learning paths
- Automated personalized surveys
- Interactive chatbots with AI
- Data-driven onboarding platforms

AI-powered onboarding assistants

- Personalized guidance to new employees
- Powered by chatbots or virtual agents
- Personalized instructions, answering questions, and making recommendations

What activities can it help automate and personalize?

- Communication and guided interactions through the onboarding process
- Task management and reminders
- Role-specific and contextual information
- Onboarding progress tracking and feedback loops
- Onboarding 'buddy'

Examples:

1. *Talmundo*: An AI-driven onboarding platform that helps personalize the onboarding experience for each new hire.
2. *Enboarder*: A platform that automates and personalizes the entire onboarding process, including tasks and check-ins.
3. *WorkBright*: Specializes in remote onboarding and automates document collection and compliance tasks.

Tactic #2

Balancing efficiencies with personalization through technology

COMPANY X

Welcome back, Jane!
2 tasks are waiting for you, complete these tasks and make sure you're fully prepared.

Introduce yourself

Thank you for completing the introduction.
We are looking forward to meeting you in person!

Chat with

Chat with our chatbot to all your onboarding requirements.

Where can I park?

There is a parking lot for our employees outside the office, but it's full of slots, so we recommend you come to the office.

Have you seen your compensation package?
Read all about it.

Daniel Employee

Check out our newest learning module on communication in hybrid teams.
[Learn More](#)

Claudio Mentor

You have been assigned as Daniel's learning buddy. Let's set up your first catch up.
[Schedule Now](#)

Form I-9

Your Document is Being Scanned
Detected Document: U.S. Passport
75% complete

*Document Title
U.S. Passport

*Issuing Authority
U.S. Department of State

*Document Number
E00003734

Enter the document number exactly as it appears on the document. If the document does not contain a number, enter N/A.

*Expiration Date
Awaiting OCR Autofill

WorkBright

You've been invited to complete onboarding documents for PowerUp Staffing. Please use this link to create a password, set up your account, and view your documents.
powerup.workbright.com/

Reminder: Your required forms for PowerUp Staffing are due in 3 days!
powerup.workbright.com/

Your forms for PowerUp Staffing are now LATE! Log in to complete them:
powerup.workbright.com/

Great news! Learning engagement has increased to 71%! You can see the overall performance [HERE](#)

Company X © 2021 Privacy Policy

AIHR

Balancing efficiencies with personalization through technology

Automated and personalized

- AI-powered onboarding assistants
- **Personalized learning paths**
- Automated personalized surveys
- Interactive chatbots with AI
- Data-driven onboarding platforms

Personalized learning paths

- Uses data and machine learning algorithms to curate customized training materials and development programs
- Paths adapt in real-time as the employee progresses

What activities can it help automate and personalize?

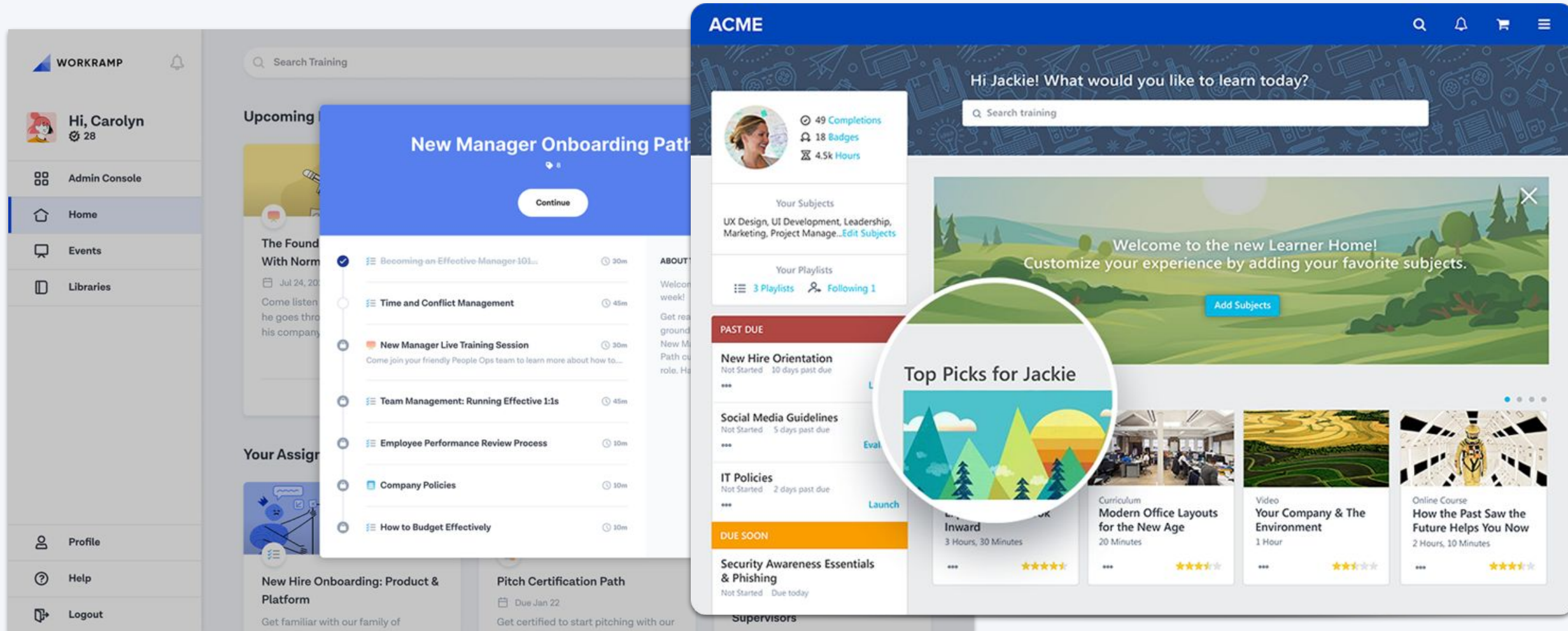
- Skill gap analysis to provide tailored training programs
- Role-specific onboarding tailored to the employee's job
- Ongoing development recommendations based on the employee's progress and aspirations

Examples:

1. *WorkRamp*: Provides personalized learning paths and integrates with other onboarding tools to streamline the training process.
2. *Cornerstone OnDemand*: Offers a learning management system (LMS) that tailors courses and materials to individual employees' roles and learning preferences.
3. *Docebo*: An AI-powered LMS that curates personalized learning experiences for employees based on real-time data and feedback.

Tactic #2

Balancing efficiencies with personalization through technology



Balancing efficiencies with personalization through technology

BENEFITS

- Creates efficiencies across the onboarding process
- Eliminates errors and compliance risks
- Ensures that employees are set up for success
- Delivers personalized experiences at scale
- Even a small enhancement can improve the onboarding experience



POTENTIAL PITFALLS

1. Over-reliance on technology
2. Lack of human oversight in decision-making
3. Not moving out of the automation mindset when it comes to technology use

Establishing continuous listening mechanisms

What does it entail and why is it relevant?

- ❑ Shifting from feedback on the process to insight on the experience
- ❑ Establishing multiple feedback points across multiple channels
- ❑ Closing the loop / iterating based on feedback



Establishing continuous listening mechanisms

Set feedback collection points

- Aligned to moments that matter
- Across the onboarding journey
- At minimum pre-onboarding, first day check-in, pulse survey (bi-weekly or monthly) and end-of-onboarding review

Establish feedback channels

- Surveys & questionnaires
- One-on-one check-ins
- Digital touchpoints
- Peer feedback

Analysis and response

- Sentiment analysis
- Trend analysis
- Escalations and issue resolution
- Predictive analytics

Considerations:

1. What type of feedback is valuable?
2. What is the desired experience you want to measure?
3. How will you use the feedback?
4. How can technology support the process?

Tactic #3

Establishing continuous listening mechanisms

Feedback report [Tell me more](#)

Topics Response rate

469 feedback received ↑ 8 in the last 30 days

75% anonymous



120 Positive feedback ↑ 8% in the last 30 days

Officevibe

- Personalized survey questions
- Two-way feedback

Trending topics

Search by topic

Topic

Mentions

Variation

Deadline

Team

Visibility

Account

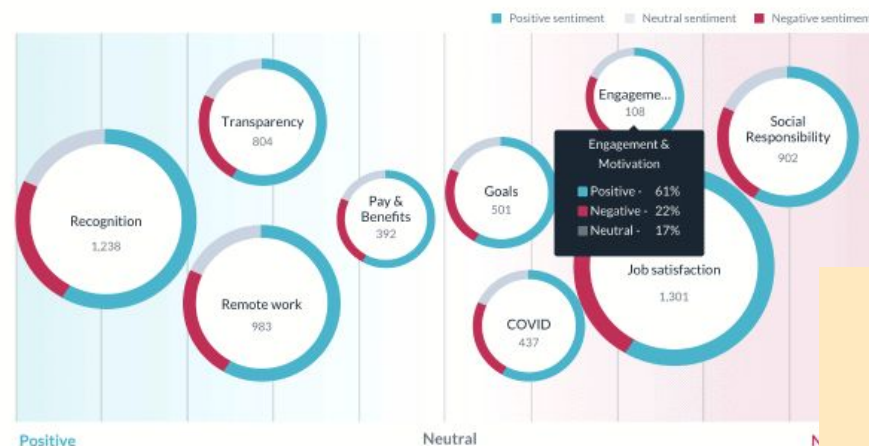
Benefits

Top topics

AI-based

View Topics Report

Top 10 discovered topics. The size of the circle is relative to the number of comments where the topics was discovered.



Admin View

- Dashboards
- Surveys
- Progress Plans
- Cheers
- Wins
- Suggestions
- Reports
- Share Center
- Settings
- User Management
- Add People

< Back

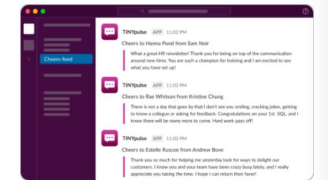
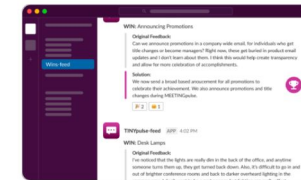
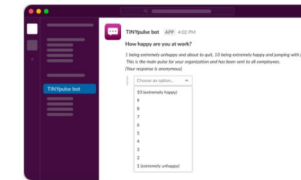


Slack

Watch your organization's TINYPulse activity skyrocket when you connect to Slack!

- TINYPulse-bot: Enable pulse survey delivery to Slack and employees can submit their responses directly from their app.
- Wins Feed: Stream anonymous suggestions, initiatives, and Wins to a Slack channel to improve transparency and highlight progress.
- Cheers Feed: Connect Cheers to a Slack channel for a live feed of employee shout-outs and recognition of one another.

[Learn more](#)



To this Slack Channel

TINYPulse

- Integrates with collaboration tools
- Weekly pulses

Betterworks Engage

- Real-time analysis and sentiment analysis
- Manager prompts

Establishing continuous listening mechanisms

BENEFITS

- Real-time insights into the onboarding journey
- Allows for iterations and interventions throughout the process
- Creates trust and transparency in the process
- Enables line managers to take ownership of the process



POTENTIAL PITFALLS

1. Data that is gathered and not used has little value
2. Feedback is not actionable
3. Analysis becomes retrospective and not real-time insights



4

Getting started

How to get started

What are the objectives of onboarding in your organization?

What is the desired onboarding experience that you want to create?

What processes and technology is required to bring this experience to life?

How do you create feedback loops in the onboarding process?

How do you enable critical role players?

Why is it important

What should it deliver

How do you operationalize it

How do you enable others



**Any questions?
Ask away!**