Implementing a pragmatic onboarding process with Microsoft

NUDGEIT

Contents

Executive Summary

Whether you are a HR manager, IT manager or an operational manager, you will know how important it is to make new employees feel welcome, valued and prepared during the onboarding process. Not only will onboarding ensure the correct vital paperwork is completed, but is will also help employees get to know more about the company culture, values and what is expected of them.

Businesses naturally spend vast amounts of time and money recruiting the best possible employees, with CV's, phone interviews, skills tests, personality tests and in-person interviews all used as a way to source the most qualified candidates who are a great fit for the business. However, once the candidates are hired and actual onboarding begins, the complex, choked and labour-intensive process can leave new starters feeling less than prepared.
In this whitepaper, we will explore the complexities surrounding both the hiring and employee onboarding processes, by looking at how these issues can be overcome to improve job satisfaction, productivity, and employee retention through various frameworks and digitisation.
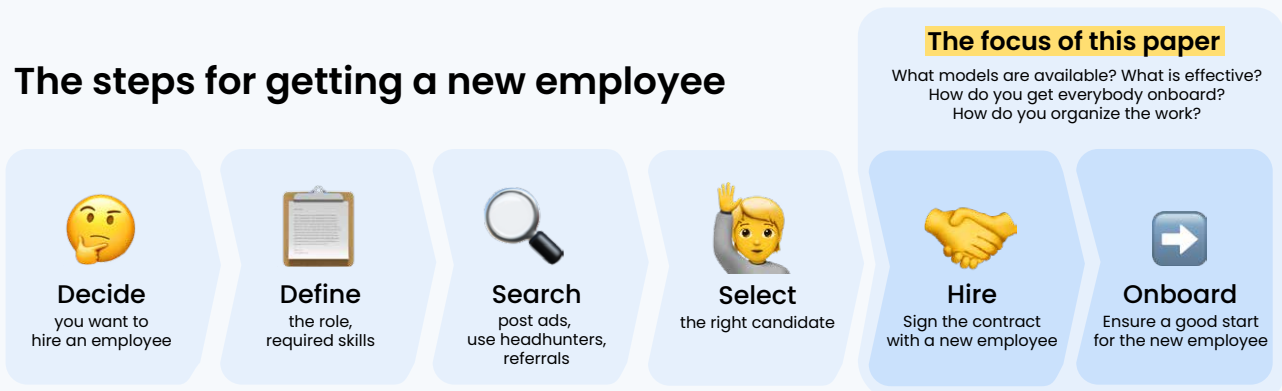
The focus of this whitepaper

The whitepaper will cover the complexities surrounding the important employee hiring and onboarding process and how it is possible to create a smooth, efficient, and consistent process that is geared towards welcoming and retaining your new starters. As you can see in Figure 1 below, there are many steps involved, from deciding that a new employee is needed and defining the role through to searching for candidates, hiring, and finally onboarding.

Onboarding is often time-consuming and complex, but by following a structured process with minimal manual inputs it is possible to save time, create a great first impression and remove the confusion which often surrounds the inter-departmental processes. There are many frameworks available which are designed to support onboarding, and this whitepaper will introduce you to the options, advise on the best choices and guide you towards a more efficient hiring and onboarding process through digitisation and onboarding.

Figure 1: From deciding to find a new employee to onboarding it is a long process, but finding the right person is essential and it is equally important to ensure that the person stays and become effective, a process which is often far from easy.

The steps for getting a new employee

The focus of this paper
What models are available? What is effective?
How do you get everybody onboard?
How do you organize the work?

🤔
Decide
you want to
hire an employee

📋
Define
the role,
required skills

🔍
Search
post ads,
use headhunters,
referrals

🙋
Select
the right candidate

🤝
Hire
Sign the contract
with a new employee

➡️
Onboard
Ensure a good start
for the new employee

The definition of onboarding

3.1 What is employee onboarding?

Onboarding is the process which ensures your new employees are set up and prepared to start work within your business, and it begins long before their first day. While completing paperwork is an essential part of onboarding new employees, it's not the only step involved. Effective onboarding is designed to help new starters integrate into their team and the overall company culture.

Onboarding begins when the role is defined and ends when the new employee is integrated into the team. Departments like HR, IT, Finance, and the line management team are responsible for guiding new employees from interviews to feeling confident and settled in their role. A great onboarding process is key to ensuring new starters feel productive and at ease.

3.2 Why is the onboarding process so difficult?

Despite being an essential step for every business, onboarding is often a difficult process as there is no one-size-fits-all solution that works for each new starter. Many businesses follow manual, document heavy processes that involve multiple departments, and this can lead to errors, especially when there is no dedicated department to oversee the process. The following points are just some examples of why manual onboarding can be do difficult:
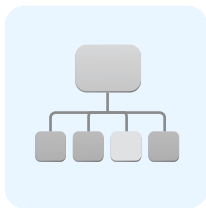
Multiple departments involved – The onboarding process involves HR, finance, IT, the employee's line manager, and their new team, leading to complexity and multiple interactions. This can make it difficult to keep track of completed processes, and there may not be a single person with a clear view of the entire process, leading to missed deadlines and lack of accountability.

Accuracy and consistency – Every new starter should feel valued and prepared, however with so many steps it is difficult to ensure that every process is completed accurately and correctly. Inevitably there will be processes which fall through the cracks, and this can damage the overall onboarding experience.

Time-consuming – The paperwork side of onboarding is time-consuming with multiple documents and emails sent between different departments. These manual workflows are inefficient and frustrating for all concerned, and they are prone to errors which can be serious if there are compliance issues.

An impersonal experience – Spending too much time on data collection and form filling will mean there is less time spent with the new employee, who would feel more valued if they were engaged in conversations with their new team. Onboarding should be tailored to the specific needs of the employee, with a consistent yet personalised approach used to create a warm welcome that meets the individuals learning styles, needs and expectations.

Ultimately, many businesses are finding that manual onboarding processes do not work and with automation solutions becoming popular within departments such as finance and customer service, now is the time to focus on streamlining and improving onboarding.

What are the benefits of a streamlined onboarding process?

Often medium-sized businesses overlook is employee onboarding, with manual hiring and onboarding processes often becoming increasingly time-consuming and complex as the company grows. However, investing in the onboarding process is an investment in the employees of your business, and as highlighted by McKinsey it will help to ensure their long-term success and retention.

In fact, according to a study by BambooHR in 2018, nearly one third of new starters leave their roles within the first months with reasons such as feeling neglected, disconnected and overwhelmed all cited. Many of these issues could be tackled from the beginning through streamlined and comprehensive onboarding.

Research by the Society for Human Resource Management (SHRM) found that businesses which invested in their onboarding processes had a 50% greater new-hire retention, with similar studies by the Aberdeen Group reporting 60% higher retention rates.

The frameworks designed to attack onboarding challenges

Your onboarding process should leave employees informed, prepared, welcome and eager to start their new role, and although the steps will differ between each company there are various frameworks available that are designed to make onboarding more efficient. The following are some examples:

The RACI model – is a framework that defines roles and responsibilities in the onboarding process. The acronym stands for Responsible, Accountable, Consulted, and Informed. By using this model, the process becomes more accountable, with a single person being responsible for signing off when tasks are completed. Those involved regularly consult with each other, ensuring strong relationships within the onboarding group, and everyone stays informed. Some examples to illustrate below.
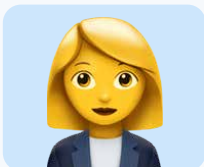
The employee's line manager could be 'Responsible' for introducing the employee to the team and assigning tasks, while the HR team is 'Accountable' for the overall process. The line manager would 'Consult' with the IT team to ensure the employee has the necessary systems access and is 'Informed' about the company's policies and procedures.
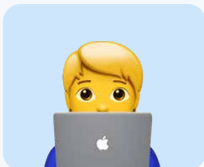
The IT team could be 'Responsible' for setting up the employee's accounts and access to company systems, while the HR team is 'Accountable' for the onboarding process. The IT team would 'Consult' with the employee's line manager to ensure they have the necessary information to set up the employee's accounts and keep them 'Informed' about the status of the process.
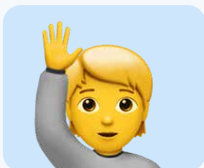
The employee's team could be 'Responsible' for providing the employee with a tour of the workplace and introducing them to colleagues, while the HR team is 'Accountable' for the overall process. The team would 'Consult' with the payroll team to ensure the employee is set up in the payroll system and is 'Informed' about the company's benefits and compensation policies.

The 70:20:10 framework – This model is geared towards improving employee knowledge and performance, with the framework suggesting that 70% of employee training should come from on-the-job experiences, 20% from colleagues and 10% from formal training. The percentages are designed to act as a guideline, with the model based on the idea that employees learn the most when they actually complete tasks, resolve issues, practice and learn from mistakes.

The ADDIE model – This model focuses on five key areas; Analysis, Design, Development, Implementation and Evaluation. It is used to organise and streamline training courses, so it can be useful within employee onboarding. The various aspects of onboarding are divided into tasks which must be completed in a specific order, with time spent on reflection between each task. This focused approach is designed to provide an easy-to-follow structure, with continuous improvement used to improve employee understanding.

The Kirkpatrick model – The Donald Kirkpatrick model features four assessment levels, reaction, learning, behaviour, and results, which are designed to assess the effectiveness of training programmes. Since 1959 it has been used as the standard model for measuring onboarding effectiveness, with factors considered such as how well training sessions were conducted, how well information was absorbed, if employees are applying their training to the roles and how results compare to performance before the training program.

The Onboarding Maturity Model – This model is used to evaluate and categorise the onboarding capabilities of an organisation, with those who operate on the low end of the maturity scale only following the most basic onboarding process. Those which have a formal process in place with effective technology, employee feedback and clear goals are considered to be at the top of the maturity scale. By assessing how a business performs it is possible to identify areas to improve within an onboarding process.

The Tuckman model – This onboarding model follows the principles of forming, storming, norming, performing and adjourning, with each stage representing a change in a team's gradual development. In terms of new starters, it can be used to help individuals find where they fit within existing teams as they adjust to new colleagues and new processes. The model does not feature a one-way process, instead a new employee can change directions if progress stops or if a new direction in the business changes the goals of the team.

Although each of the above models has good practices and principles that can be effective during onboarding they can be difficult to initially implement across multiple departments, and here at NudgeIT we believe onboarding should be simple, pragmatic, and meaningful, with the Four C's approach being an ideal model to initially adopt. The Four C model is based on the principles of Compliance, Clarity, Culture and Connection, which will combine to create an excellent foundation for a new employee.

Compliance – This aspect is the lowest level covered during onboarding and it is designed to ensure that new employees are aware and understand the various rules and regulations, both legal and those related to company policies and procedures. It also involves the completion of important paperwork, such as right to work documents, payroll, and employee benefits.

Culture – Ensuring employees are familiar with the culture and values of the business, both informal and formal, will help to ensure employees are connected to the company, the team, and the overall mission. This can be achieved through tours of the building, describing daily activities and how they will fit within their immediate team and the wider business.
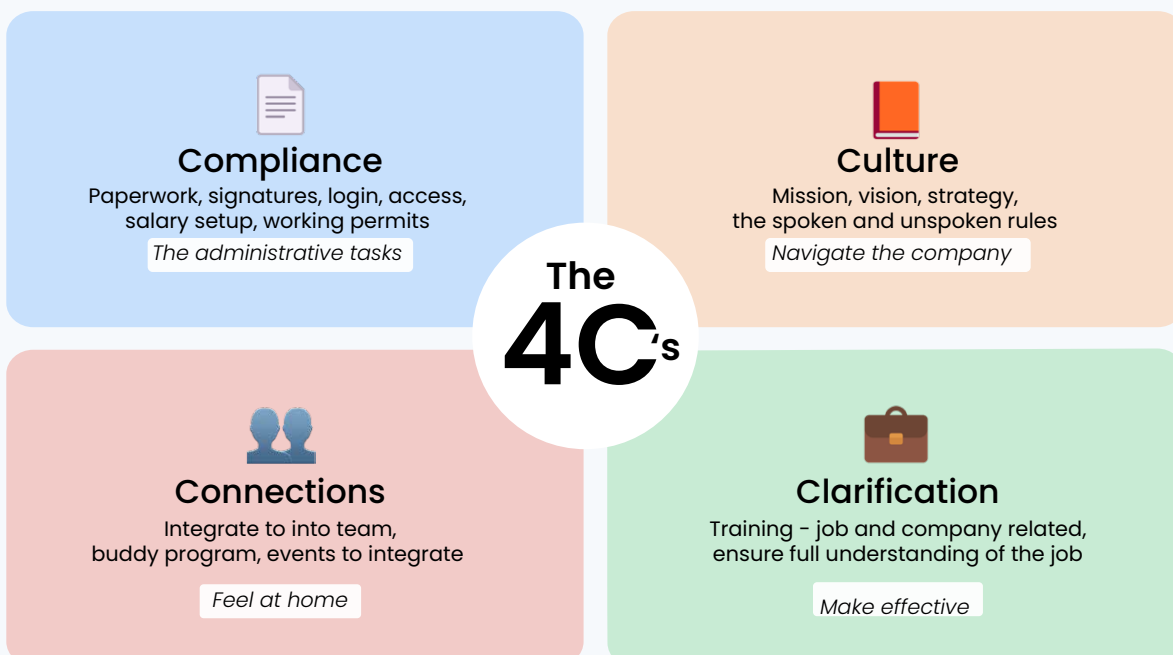
Clarification – Ensuring that employees understand their job role and what is expected of them will help them to quickly become productive within their new position. This often covers projects which they will be required to participate in and how they will contribute to the current team.

Connection – This is the highest level within the 4C onboarding model, and it focuses on helping employees to foster new relationships with their colleagues and managers that will lead to a faster and more welcoming integration process. Ideally, new employees will be introduced to as many of their team members as possible through informal activities and lunchbreaks which will help them feel part of the team.

The holistic approach to onboarding offered by the 4C model effectively addresses each of the key components that will aid an employee's success, however it is flexible enough to be tailored to an individual's needs. Figure 2 below shows a simple graphical view of the 4C approach to onboarding, which clearly shows how each of the important aspects of employee onboarding can be incorporated into the flexible framework.

Figure 2: The 4C model will enable a company to maintain a balanced view of onboarding - increasing effectiveness and productivity of new starters and ensuring they stay.

Compliance
Paperwork, signatures, login, access, salary setup, working permits
The administrative tasks

Culture
Mission, vision, strategy, the spoken and unspoken rules
Navigate the company

The **4C's**

Connections
Integrate to into team, buddy program, events to integrate
Feel at home

Clarification
Training - job and company related, ensure full understanding of the job
Make effective

Key tasks within the employee onboarding process

Onboarding is not a quick or straightforward process but by following the Four C model and ensuring key tasks are covered, it is possible to create a streamlined, effective process. The time it takes to onboard an employee can vary, however the process can be divided into four phases. The first is the time before an employee starts, phase two is their first week in the role, next is the period of time after their first week and the final phase four begins when they have settled in the role which is usually after 4-8 weeks. The following are some examples of key tasks which need to be completed during each stage:

Phase 1
- Signing of the contract and other formal documents
- Provision of access rights to the building
- Ordering the required uniform
- Details provided of work times and days
- Provision of equipment such as a computer, phone, desk, chair, and stationery
- Provision of software using accurate details such as first and last name
- Provision of IT access rights based on their role, department and location
- Creation of email address with an option for the employee to reset the password
- Organisation of a welcome package which should be with the line manager ready for the first day

Phase 2
- Ensure reception is aware of the new employee and where they should be taken
- Ensure that key team members are available
- Introduction to colleagues
- An informal meeting or lunch
- A review of job responsibilities and expectations
- Company tour
- Presentation of products and services

Phase 3
- Gather feedback from the first week
- Provision of initial tasks and setting of goals
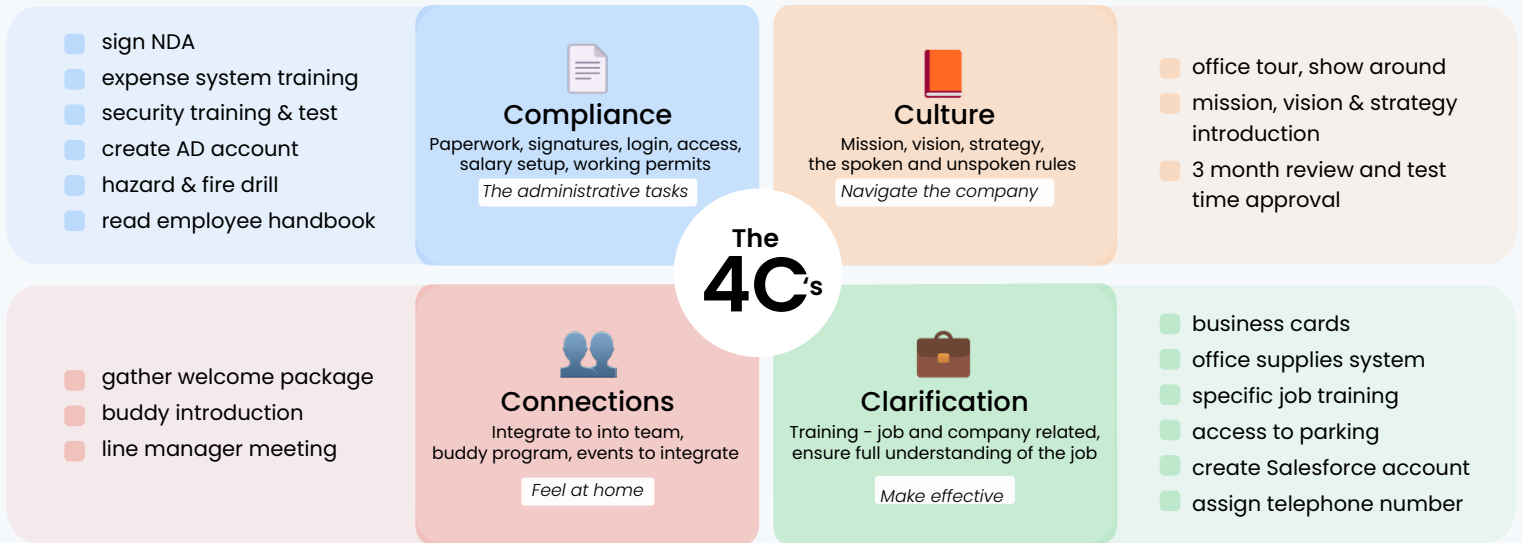- Introduction to company culture

Phase 4
- Continue to gather feedback on the employees experience
- Promotion of interdepartmental networking

As you can see from the extensive list of tasks above, many of these processes involve interdepartmental communications and with strict deadlines and manual inputs, the steps can quickly become complicated. Figure 3 below is an example of just how many onboarding tasks are involved within a small business, and without clear roles, regularly feedback and optimisation of technology wherever possible, the onboarding process can quickly become a bottleneck of confusion.

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Figure 3: The 4C tasks for a small company include a mix of automated and manual tasks, managed by HR, IT, Line Manager, Facility, and Marketing departments – have fun!

- sign NDA
- expense system training
- security training & test
- create AD account
- hazard & fire drill
- read employee handbook

Compliance
Paperwork, signatures, login, access, salary setup, working permits
The administrative tasks

Culture
Mission, vision, strategy, the spoken and unspoken rules
Navigate the company

- office tour, show around
- mission, vision & strategy introduction
- 3 month review and test time approval

The 4C's

- gather welcome package
- buddy introduction
- line manager meeting

Connections
Integrate to into team, buddy program, events to integrate
Feel at home

Clarification
Training – job and company related, ensure full understanding of the job
Make effective

- business cards
- office supplies system
- specific job training
- access to parking
- create Salesforce account
- assign telephone number

This bottleneck of complexities can be categorised as follows:

Coordination and communication – Ensuring departments effectively work together can be challenging, especially with so many tasks, deadlines, and objectives.

Data integrity and consistency – With multiple departments and tasks all required to enter data into various systems, there is a chance of errors.

Process efficiency and effectiveness – Finding a balance between these manual processes and streamlining tasks via automation can be difficult.

Training and support – With so many processes, systems, and team members involved it can be difficult to maintain consistency within training and support programs.

Meeting deadlines – In addition to coordination difficulties between departments, the ability to meet deadlines with tasks and activities can also be complex.

Managing exceptions – Every new employee will have their own individual requirements so there will be times when new starters do not conform to pre-defined onboarding processes and standard, especially across businesses with multiple departments.

Keeping up with changes – There are always changes relating to technology, regulations, and company policies, and ensuring that various departments are aware of these can be difficult.

Maintaining transparency – With multiple systems, tasks and departments involved it is important that everyone involved understands the key processes and maintaining complete transparency can be difficult.

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What aspects of onboarding can be digitised and automated?

With so many issues and obstacles to overcome, there is no simple solution to onboarding, but it is possible to mitigate many of these difficulties through digitisation and automation. The following are just some examples of processes which can be effectively digitised:

Automatically complete documents – Many aspects of onboarding can be accelerated by automating aspects of paperwork which apply to all new starters, such as document approvals, exchanging of contracts, payroll information and security clearance. Robotic Process Automation software excels at extracting information from forms and sending it to the correct channels quickly, without the risk of human error or interdepartmental errors.

Build connections – New employees will feel welcomed and part of the team when technology is used to help build connections. For example, digital team meetings are a great way to introduce new starters to a team who may be located in multiple locations. This will help employees feel welcome and valued, whilst also setting the stage for successful working relationships.

Creation of accounts – To ensure new employees are able to get started quickly they will need access to their various accounts, and it is possible to automatically sync accounts and grant access permissions without the need for manual, error prone data entry.

Training programs – A key part of employee onboarding is training, and this can be time-consuming and inefficient. There are likely to be many aspects that can be recorded in the form of training videos, which new employees can work through at their own pace.

Reminders and tracking – Onboarding employees is naturally a time-consuming process, so it is important to ensure that tasks are completed effectively by tracking onboarding progress and by setting regular reminders. These can start before the employees first day, with tasks such as ordering equipment and ensuring it is installed ideal for adding to a automated checklist.

Should I invest in onboarding automation?

Digitisation and automation are not new concepts, with many managers already familiar with useful tools such as chatbots and automated reminders. However, it is possible to build on these familiar concepts with intuitive onboarding solutions that are designed with frameworks such as the Four C's approach in mind.

The NudgeIT team can work with your business to automate and streamline the laborious and repetitive tasks which often interrupt the onboarding flow. By creating a standardised, consistent approach to onboarding which is in line with the 4C framework, we will improve and personalise the experience for your employees. Whether you are looking to automatically collect information, route documents, improve accuracy or improve connections between departments, we will create an efficient and optimised workflow which improves employee satisfaction.

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Here at NudgeIt, we believe there are always benefits when making tangible, pragmatic improvements to processes, and the benefits begin as soon as the onboarding process starts. The phrase 'Rome wasn't built in a day' often applies to automation, and we always aim to build simple automations which the team can easily understand. This begins with addressing the most important areas to automate and through a collaborative effort and continuous feedback, we can help to develop further solutions which transform the onboarding process.

There are 3 key factors which often help our clients decide whether it is time to automate the onboarding process:
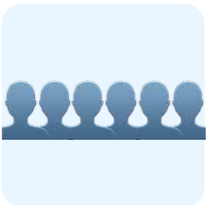
Volume of new hires – If you only have one or two new employees each year, it may not be worth investing time and money into digitising and automating the onboarding process. However, if your business enters a period of rapid growth or if new employees are starting each month, it may be time to consider even the partial automation of the process. As the number of new employees rises so will the case for automation.

Low staff retention – Although industries such as hospitality and retail are known for having a higher turnover of staff, if a high percentage of your new recruits are leaving within the first 3 months the onboarding process could be to blame. If you have more than 15% of new hires leaving within the first 6 months, you should definitely consider whether there are aspects of the onboarding process which require improvement.
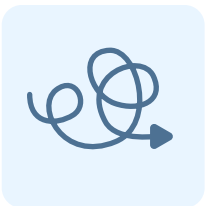
Lack of organisation – When you find the perfect candidate for a role it is important to give them a great impression of the business. But, if lack of organisation is leading to the HR team, IT and line managers scrambling about to sort basic necessities on the first day this will not help your new employee get off to a great start.

If any of the above points sound familiar within your organisation, it is time to reach out to the NudgeIT specialists to discuss your options – Explore onboarding digitisation and automation'. If you do not feel ready to start the digital onboarding process, there are simple tools available which could offer improvements to your business and this short guide with help: How to capture all the onboarding tasks and keep track using Microsoft list.

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