

Beyond the Basics

Doing onboarding right today requires an effective process combined with emerging technology tools.

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By now, the notion that onboarding is a critical component of any new hire's life is firmly established in the human resource community and among the employers it serves.

Yet, there are nagging statistics that might lead one to believe that, while onboarding is considered table stakes in areas such as productivity, retention, employee engagement and loyalty, it appears all is not well on the onboarding front for many employers.

For example, more than half of all employees who left their jobs in the past year did so within the first 12 months, according to a 2015 Equifax report on turnover. And the Society for Human Resource Management, in a detailed study about onboarding, reports that half of all hourly workers leave new jobs in the first four months and half of senior outside hires fail within 18 months.

In fact, SHRM, in other research, reports that new employees decide within the first 30 days whether they feel welcome in the organization and one in 25 people

leave a new job just because of a poor (or nonexistent) onboarding program.

Those numbers and others abound in the research on the potentially negative relationship between onboarding and retention. And it all begs the question: Is your organization doing onboarding right?

"With onboarding, it's so important to cover all the bases," says Danielle Simer, global portfolio marketing manager at Hyland, creator of OnBase. "That means making sure everything is running smoothly behind the scenes, so HR can proactively address every specific issue." She mentions everything from ensuring a desk, computer and password are ready when the new hire arrives to ensuring a smooth transition to filling out benefits paperwork and registering for training. "These are the initial but critical steps of any successful onboarding process," she says.

Philadelphia-based Karen Piercy, a partner in Mercer's talent business, says that, while the early transactional

aspects of onboarding sound like the “basics,” typically they are far more challenging for companies than one would expect.

“Getting a new employee fully enrolled and ready to work on the first day is not to be taken for granted,” she says, explaining that the critical elements of onboarding start with the paperwork—tax forms, I-9, benefits enrollment, direct deposit and other forms. Another element is having the right tools to do the job on the first day—laptop, cell phone, office phone, tablet, credit cards, business cards and even assigned office space.

“Even with the right technology, a new employee needs the correct system access and login information, email address and mailing lists, job-appropriate applications/programs, and security badging and access,” she says.

Many employers wait until the employee has started his or her new job before they begin many of these processes. But benefits can be decided and enrolled in before the employee starts.

“Imagine the difference between [employees entering an unprepared environment and those] who come to work and, on the first day, have all the technology hardware, software and access they need to do their jobs,” Piercy says. “Credit cards and business cards are waiting in their offices. Their badges and user IDs allow them access to the physical space and the technology they need to be productive.” While all of this sometimes will work in a manual environment, she says, onboarding technology and systems give employers the ability to standardize paperwork, provisioning and policies so that all new employees are set on day one.

She adds that onboarding systems often are difficult to implement, as there is often not a current “process owner” for the entire onboarding procedure. In fact, onboarding is often not owned by a single department. Also, many organizations have not documented all the onboarding steps and activities, so there is a big discovery step that needs to happen before the technology is configured.

“And even then, many of the tools and processes that are currently done manually need to be redesigned to make



them appropriate for automating—you don’t want to just automate a manual process, but redesign it to get the most out of the technology,” she says.

Proper Preparations

John Herath, HR director for Orion International, which specializes in best-in-class programs that allow employers to attract, hire, develop and retain high-quality military talent, says the basics should be the easy part, but that often isn’t the case.

“As we have seen, getting the basics wrong, even with the ‘softer’ things done right, will result in turnover,” he says. “Heck, a new employee coming into your company for the first time should expect to have someone meet [him or her] at the reception area.”

Herath says this greeting person should have an agenda for the new employees’ first days so they know what to expect. They should then be escorted to their work areas (desks/offices/cubicles or other areas where their personal items are stored) so they can put down whatever they brought with them. Next, new hires should be oriented to the coffee/tea/refrigerator and restrooms. Next on the agenda should be the chance to



finish any paperwork that has not yet been completed, whether via paper or online. Finally, they should meet their hiring manager once they are ready to begin training for their new job.

“Various levels of employees will have other steps/ requirements, but in order for any of this to happen, the preparation needs to be done correctly, and that preparation starts with communication,” Herath says.

First, the hiring team (whether HR or an internal hiring manager) will need to communicate and coordinate with the various departments, explaining that the new hire will arrive, on what date and at what time, and providing the information they will need to complete their tasks.

It also is important to coordinate the start date with all these departments so the necessary resources will be available on time, Herath says. Departments to be coordinated with include, but are not limited to, HR (including payroll), benefits and training, security or building management (access cards), information systems (computer, e-mail address, software licenses, IT training, access control), marketing or administrative team (business cards), and anyone else who will be

involved in the initial training and orientation of the new employee.

Also, if the new person just shows up without preparation, the result is sure to bring delays, boredom and discontent for the new employee, but also resentment from the departments caught off guard because they now have to scramble and rearrange to get the new hire processed as quickly as possible.

Herath, in fact, spent time at a recent workshop about onboarding, and says the challenges that were presented by various participants could generally be boiled down to communication and resource-allocation issues.

“[Those in the] hiring department need their replacement to start ASAP, so they make an offer and set a start date,” he says. “But none of the other departments are given the correct amount of time to complete their requirements, so the new employees sit [uncomfortably] for the first several days because they cannot perform any of the tasks they were hired to perform.”

It’s an obvious and very preventable waste of time and money, Herath says, not to mention the negative impact on the morale and momentum of the new employees, who were very motivated when they first arrived. “But after sitting around for three days, they will have a new perspective on how this new company operates,” he says.

The Technology Solution

It may seem to be a “win” to get the employee started today instead of two weeks from today, Herath says, but the reality is that the new employee will not be productive until the entire onboarding process is complete. And there is good reason why these departments ask for some time to get those resources organized and online: If the hiring team is organized, has a plan and communicates that plan effectively with all interested parties, it can keep the “speed-demon” mindset from ruining an otherwise positive first experience with a new employer.

“The more volume that is required to be processed, the more important technology will become to the solution,” Herath says. “If you only process one or two new hires per month, you can probably keep up with your plan. If you process one, two or more new hires per hour, you are going to need some technology to prevent double- and triple-work.”

For example, particular industry sectors with high turnover rates, such as retail, or employers that do seasonal hiring of college graduates, could have unique onboarding challenges that would be prime candidates for various technology solutions.

According to Herath, video webinars—which should include a welcome from the CEO and benefits orientation—are huge time-savers. Employee self-service, he adds, has to be the biggest time-saver since the fax machine, as it reduces the number of resources needed on the overhead/administrative side by allowing the “many” to complete data entry while the “few” audit and approve.

“Mobile apps are critical in the high-volume, remote-employee environment,” he says, noting that a majority of website hits are now from mobile devices, and if your systems are not mobile-friendly, they will slow the process. On the other hand, if your new hires can process and sign forms from their phones or tablets, they will likely take action immediately—rather than waiting until they have access to a desktop computer.

“Any technology that helps the team communicate and puts more of the effort on the ‘many’ [new hires] so that the ‘few’ [HR personnel] can stay as efficient as possible is a critical piece of the onboarding puzzle,” Herath says. An example would be a centralized location or application through which each new hire’s status on each phase of the process is tracked and part of an effective workflow process.

For example, there would be an HR-paperwork section, an IT computer and software section, etc. Each time a task is completed, the corresponding task is updated. This gives hiring managers or other HR personnel visibility into the onboarding process across each department involved. Once all tasks are completed, the new hire is clear to start.

“That way, everyone can see if one section is delaying the process and [can] allocate resources to correct the problem,” he says. “Hiring managers waiting for their new hires can visit this page to get the whole picture instead of communicating separately with each department. Departments can see if they are falling behind their peers and [can] reallocate resources internally.”

Nicholas L. Turner, co-CEO at Sanford Rose Associates, an executive search firm in Plano, Texas, echoes the

idea that successfully achieving the basic blocking and tackling of onboarding requires a “template” that logs and manages every part of the early onboarding process.



“We have a template in our operations team management software,” he says. “For every new hire, we simply copy the template and change the name to the hire’s name.”

That way, everything is an action that is assigned to the specific person who handles that part of the process and each person is assigned due dates.

“We know when it is being done, including progress notes, or any issues that may arise,” he says. “We can also see actions [resulting from these circumstances] that would be new custom task assignments as well.”

Turner’s simple advice? Create and refine templates, forms and processes one time. “Make it perfect and it will become a cookie-cutter process that will consistently deliver success to that critical part of the onboarding experience.”

And for many employers, says Hyland’s Simer, turning to today’s technology solutions offers a way to get to that place.

“Despite the negative statistics still attached to onboarding, all employers want to offer the best possible onboarding experience,” she says. “But in order to succeed, they must have the basics down pat, or their efforts will fall short. Technology can go a long way in making sure that doesn’t happen.”

Employee Onboarding with OnBase by Hyland

For today's employers large and small, the importance of successful onboarding can't be overemphasized. The employee onboarding solution from OnBase was created with exactly that in mind.

"If your process can't handle the basic blocking and tackling, all the other bells and whistles you try to incorporate into onboarding will be money and time wasted," says Danielle Simer, global portfolio marketing manager at Hyland, creator of Onbase.

OnBase accelerates and improves employee onboarding by giving HR professionals the tools they need to better manage the process while, at the same time, providing new employees with as smooth a transition as possible.

"By providing HR with a holistic view of all related information in a single location, our solution enables HR staff to easily track the entire onboarding process and monitor tasks across departments," Simer says.

Through automation and centralized information management, OnBase supports more effective onboarding and ultimately improves the service HR provides to new employees—ensuring they are ready for work on day one.

It's all about the data: centralized information.

OnBase is an enterprise information management platform that empowers HR personnel—and other key staff members with the appropriate permissions—with increased visibility into the onboarding process and access to all relevant content and information, she says.

For example, essential new-hire paperwork and information is captured, organized and secured in a single system, along with information regarding the status of onboarding tasks across departments. This information is then centralized and accessible to those who need it.

"This way, HR gets a holistic view of who is assigned to which tasks and how the process is progressing across the organization," Simer says. "This allows personnel to better identify any missing documents or bottlenecks

in the process and respond accordingly, ensuring onboarding is completed accurately and in a timely manner."

It drives accountability with simplified departmental checklists.

Best of all, it's practically all automated. Once HR receives a signed new-employee offer letter, OnBase creates an electronic file folder for his or her information and automatically generates multiple checklists based on the new employee's specific role and/or department. The system then assigns checklists to the appropriate departments—from information services to internal training units—and issues notifications to the relevant contacts for fulfillment. This automated process reduces time spent manually creating and distributing tasks, ensuring that all employees follow the correct onboarding process steps.

In addition, HR staff and business managers, with permission, can also modify checklists and change task assignments as policies change or roles are redefined, ensuring that all staff are following the most up-to-date onboarding procedures.

It improves employee service by boosting efficiency, accuracy.

Finally, as mentioned, it's critical that, from day one, new employees feel comfortable and well-prepared to do their jobs. By completing the onboarding process efficiently and accurately, organizations not only provide new employees with the software, hardware, training materials and physical tools they need to complete their work, but also provide them with a positive first experience in their new organization.

"With greater efficiency and increased visibility into the process, OnBase helps HR spend less time on manual, low-impact tasks like filing documents and coordinating between departments" Simer says. "It allows HR more time to focus on loyalty-building activities, like creating a positive onboarding experience and first impression for their new employees."