

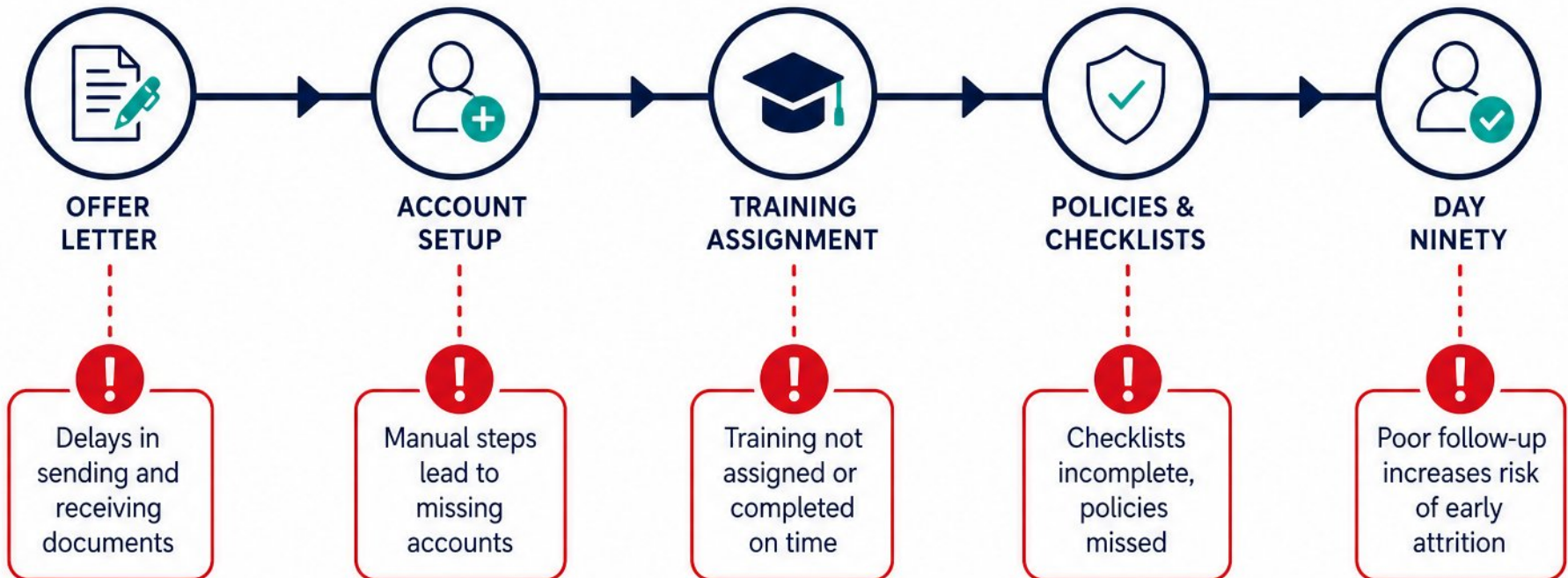
How to Automate Employee Onboarding: A Practical Workflow

- Software, triggers, and integrations handle repetitive administrative steps
- Workflow: diagnose, prioritize, build, launch, and measure
- Outcomes: less manual work, faster productivity, better new-hire experience
- Ensures compliance consistency across every hire
- Built for HR operations, people-ops leads, and small-business owners



Why Manual Onboarding Breaks Down

- - Manual processes struggle to scale across offer-to-90-days
- - Repetitive tasks: documents, accounts, training, policies, checklists
- - Common failures: delays, missing paperwork, poor follow-up
- - High cost in hours, compliance risk, and early attrition



The Business Case for Automating Onboarding

BEFORE: CHAOS



AFTER: STRUCTURED FLOW



- Cuts time-to-productivity from weeks down to days



- Reduces HR admin hours and data-entry errors



- Structured onboarding lifts new-hire satisfaction and early retention



- Frees teams for manager check-ins, culture, and coaching



- Frame for leadership: lower cost, faster ramp, stronger retention

What to Automate First: Quick Wins and Human Moments

- Automate high-volume, rule-based tasks: paperwork, IT provisioning, training assignments, reminders.
- Best first candidates: offer letters, background checks, welcome emails, task lists, policy sign-offs.
- Keep human: personal welcomes, manager check-ins, mentorship, culture-setting moments, exception handling.
- Simple test: is it identical for every hire and rule-based? Automate it. Otherwise, leave it human-led.

AUTOMATABLE



Offer letters



Background checks



Welcome emails



Task lists, policy sign-offs

HUMAN-LED



Personal welcomes



Manager check-ins



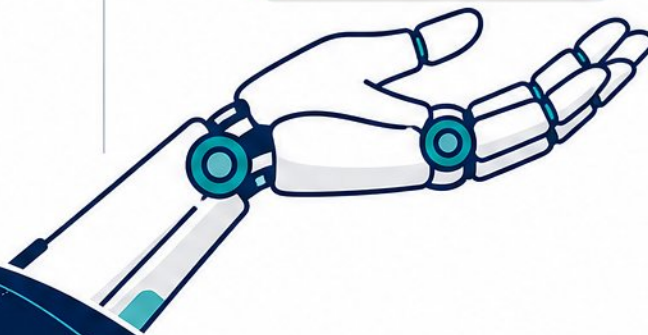
Mentorship



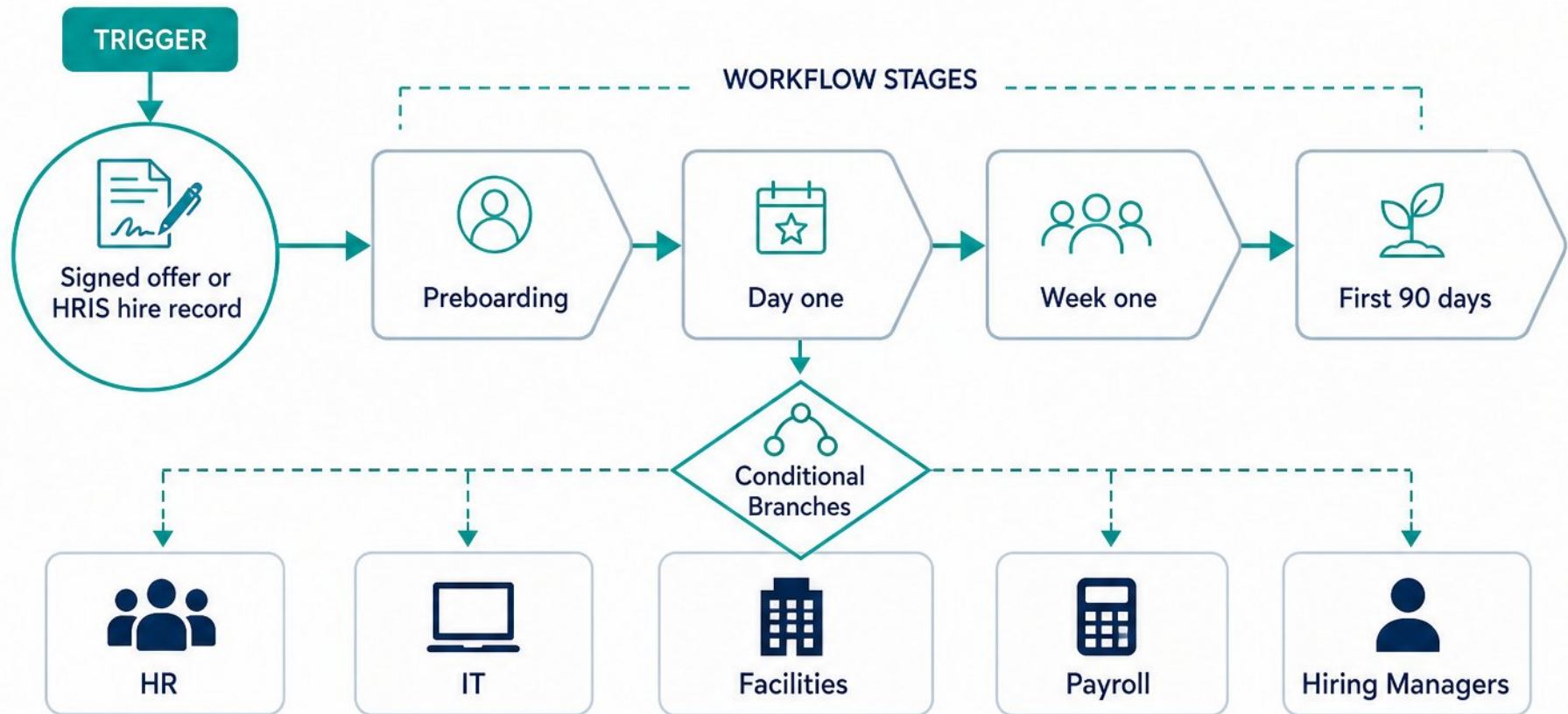
Culture-setting moments



Exception handling



Designing the Workflow: Triggers, Stages, and Handoffs



- Start with a clear trigger: signed offer or HRIS hire record
- Sequence dynamic stages: preboarding, day one, week one, first 90 days
- Define explicit handoffs among HR, IT, facilities, payroll, and hiring managers
- Use conditional branches based on role, location, status, and department
- Personalize journeys automatically without manual routing

Choosing the Right Automation Tooling



	 HRIS Modules	 Workflow Platforms	 No-Code Tools
 Team Size			
 Budget			
 Integration Depth			

- ✓ Compare HRIS modules, workflow platforms, and no-code tools.
- ✓ Integration first: payroll, email, identity, and document signing.
- ✓ Match complexity to team size, budget, and IT support.
- ✓ Consolidate around one system of record to avoid tool sprawl.

Compliance, Data, and Security by Design



- Regulated docs: I-9, W-4, tax forms, background checks, policy acknowledgments



- Build deadlines (e.g., I-9 by day 3) into workflows



- Maintain audit trails, role-based permissions, and secure document storage



- Automate compliance evidence collection with dates and version control



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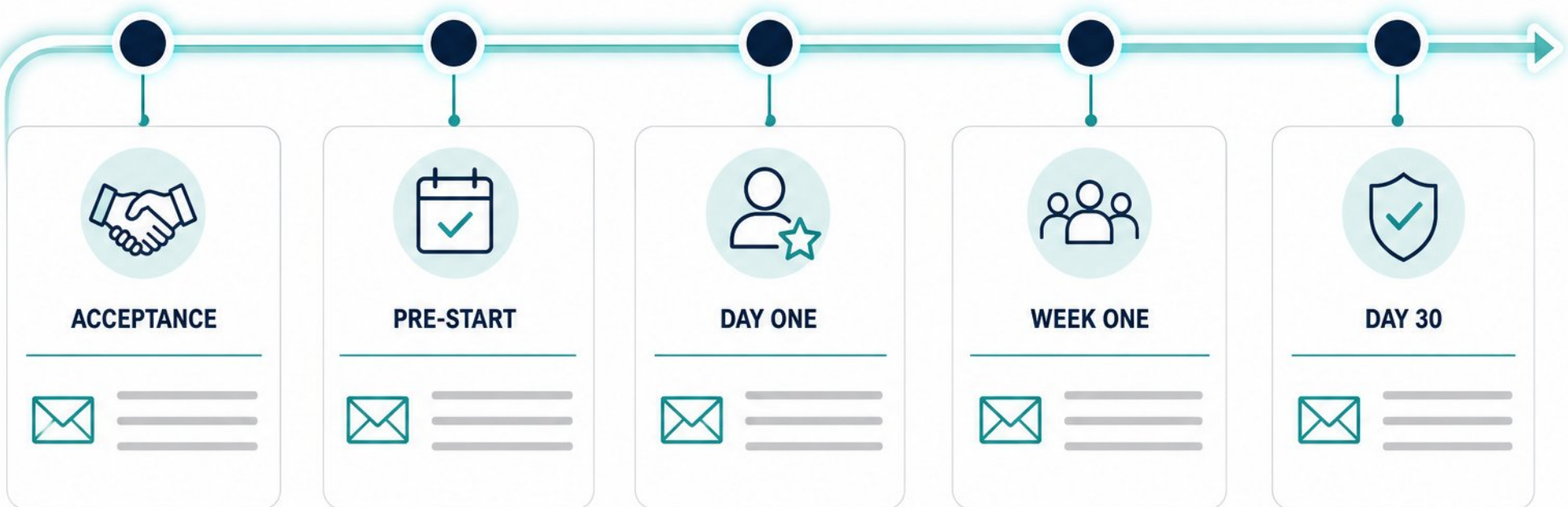
SECURELY STORED



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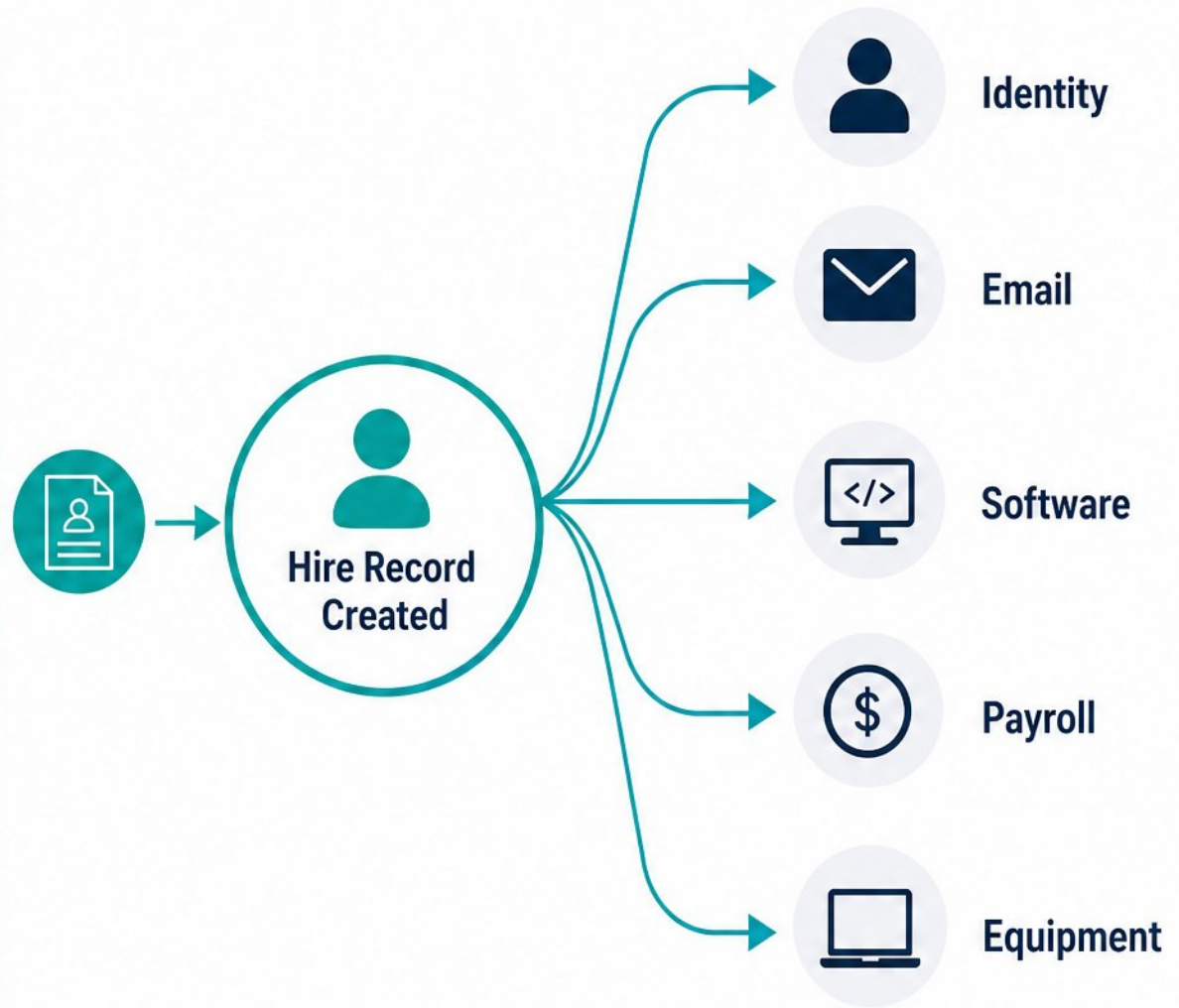
Templates and Trigger-Based Communications

- ✓ - Build reusable templates for offers, welcomes, checklists, and training invites
- ✓ - Use dynamic fields to personalize emails without manual editing
- ✓ - Trigger sequences at key milestones: acceptance, pre-start, day one, week one, day 30
- ✓ - Set suppression rules so completed steps don't trigger unnecessary emails
- ✓ - Define escalation paths for stalled or incomplete required actions



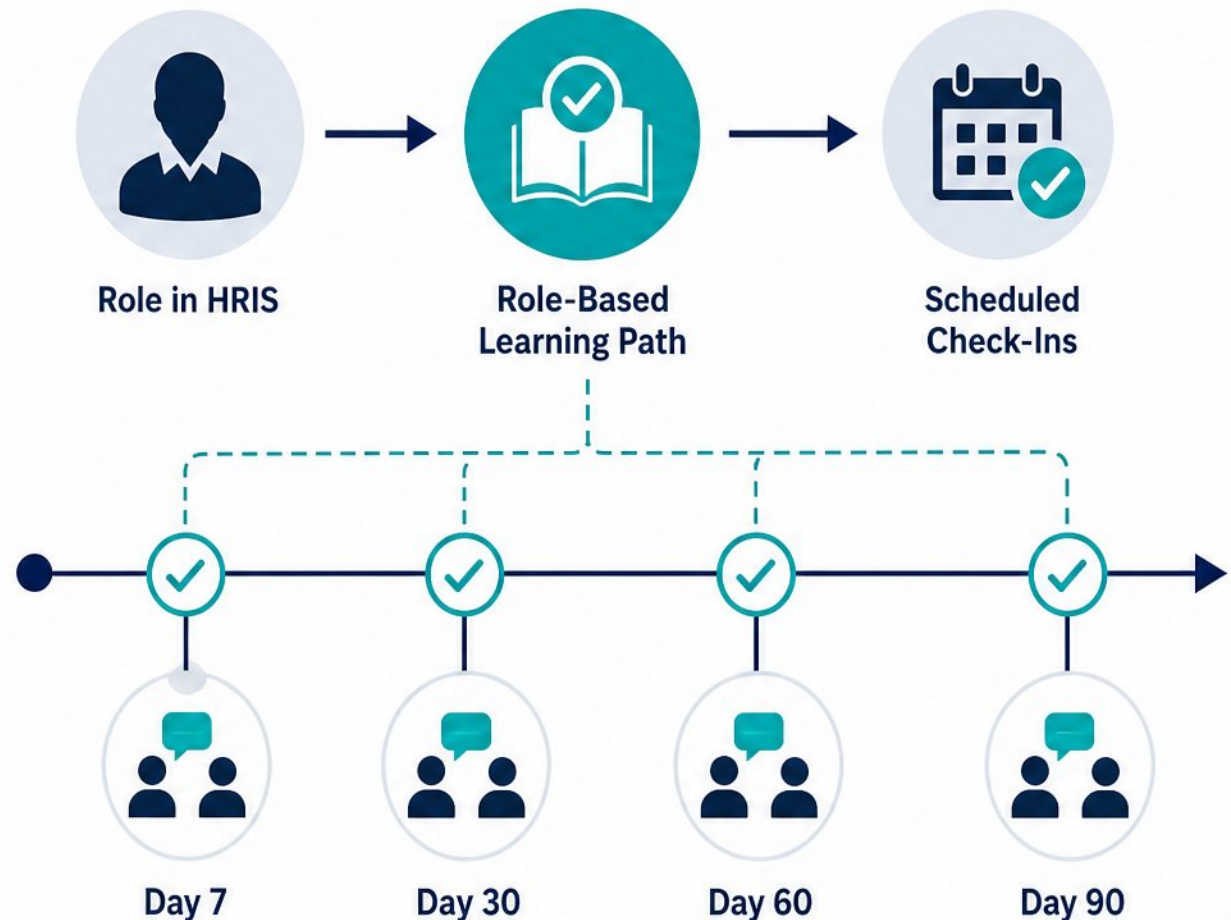
Automating IT Provisioning and Account Setup

- Role-based templates trigger account creation and license assignment from the HRIS
- One 'hire record created' event fans out to identity, email, software, and payroll
- Automated verification ensures no new hire arrives on day one without access
- Route high-risk access and exception approvals to human reviewers



Automating Training Assignment and 30-60-90 Check-Ins

- ✓ Role-based learning paths trigger automatically from the HRIS role field
- ✓ Completion tracking with reminders and manager notifications
- ✓ Schedule survey and check-in triggers at days 7, 30, 60, and 90
- ✓ Automate the scheduling and tracking; keep the conversation human



Measuring and Improving the Workflow



- Track time-to-productivity, task completion, HR time saved, new-hire satisfaction



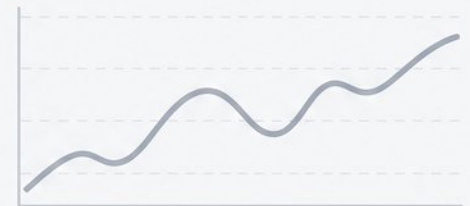
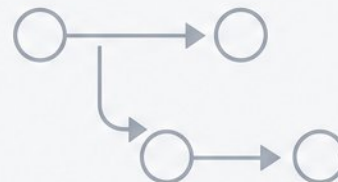
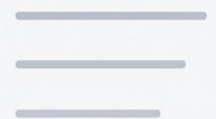
- Collect feedback from new hires, hiring managers, and HR staff



- Review bottlenecks, failed steps, and overdue tasks



- Iterate quarterly; monitor leading indicators like manager task completion and day-7 satisfaction



Implementation Plan and Change Management



- Pilot with one department or new-hire cohort, then expand



- Involve IT, payroll, HR, and hiring managers early



- Document the workflow and provide short reference guides



- Use user acceptance testing as first change step



- Communicate the 'why' and assign ongoing ownership



PILOT COHORT

Test the process, gather feedback, and refine.



EXPAND TO MORE TEAMS

Roll out to additional teams and departments.



ORGANIZATION-WIDE ONBOARDING

Consistent, effective onboarding across the entire organization.

Common Mistakes and How to Avoid Them



Map and document the process before building any automation



Keep manager welcome calls and mentorship conversations human-led



Start with one high-friction task or one team cohort



Build conditional branches and escalation paths for exceptions



Protect judgment moments; automate scheduling and tracking around them

Next Steps for Your Team

- ✓ - Use the workflow: diagnose, prioritize, build, launch, and measure
- ✓ - Select a pilot: pick one high-friction, rules-based task first
- ✓ - Run a discovery audit of current onboarding tasks for automation potential
- ✓ - Compare tools on workflow depth, integration coverage, and ease of maintenance
- ✓ - Track baseline metrics before launch to prove early results



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