

BUILDING AN AUTOMATED ONBOARDING PROCESS

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ABSTRACT

This chapter comprises of in-depth study of Onboarding Process. It entails a thorough study of the Onboarding Process in terms of the “as-is” process and the “to-be” process. The focus of the chapter is to understand the objectives of the Onboarding Process and the extent to which these objectives were met. It helped create awareness with regard to various core and support groups to help roll out the process smoothly. Additionally, the compliance and effectiveness of the process was investigated through audit of employee records to check the adherence to process to provide a way forward on the status quo. A study of the available literature pointed out that Onboarding Process has a far-reaching impact on the turnover and productivity of the employee thereby impacting the overall performance of the organization. The inference drawn was that the current Onboarding process has lacunas that need to be filled through a review of the File Management System and periodic audits to control deviations.

INTRODUCTION

Onboarding is a process wherein new employees are integrated into the framework of the organization and every possible effort is made to make them feel welcome and well integrated into the system. This process has a significant impact on the employee in terms of the pace at which he/she settles down in the organization, thinks of career progression within the organization and in the long run, it has a far reaching impact in terms of his/her retention in the organization. The idea behind Onboarding Process is to not only make the employee feel a sense of belonging with the organization but also to make him feel inspired to align his goals with the goals of the organization and thereby grow with the organization. This includes diagnosis, guidance, strategy and best practices. **(Lee)**

Considering best practices for the organization’s processes provides a way forward in the right direction, but at the same time it is essential to customize these practices in line with the unique needs and goals of the organization. Onboarding as a process is gaining importance with each passing day because it has a direct bearing on the morale, productivity and retention of the employee. Past researches have proven that employees who undergo a well structured and well laid out induction cum onboarding programme show more signs of staying in the organization post a three years time span. Employee productivity is a key factor in determining the overall success of the organization and researchers have found that employees with a positive and fulfilling onboarding experience have displayed better and quicker productivity as a consequence of an effective Onboarding programme. **(Lee)**

Hunter Douglas has confirmed that notching up the Onboarding process had a positive impact on improving the turnover rate drastically. A decline in the turnover rate also aids in reducing recruitment budget. A good onboarding process also helped improving attendance, thereby improving the inclination and involvement towards the job. A sound Onboarding Process comprising of considerable investment in time and resources helps to enhance levels of employee engagement. The reason being that Onboarding as a process enables employees to understand their job better and be successful in terms of the deliverables and results thereto. Briefly put, it looks into the “What needs to be done to make the employee do his job successfully?”

REVIEW OF LITERATURE

Saba 2014 emphasizes on the use of socially driven technologies to boost the Onboarding process. This helps spike up the productivity of new hires at the earliest. It is a good idea to have social communities to speed up the settling-down of new hires in the organization as it provides a comfortable setting to the new joiners to find their feet in the organization. The next crucial step is to transform the new joiner into one who is outstanding both in performance and contribution. Rather than getting over-involved in paperwork, the organizations would do well to provide new hires opportunities to engage in communication networks developed through connections. (Laurano 2013) states that the times are uncertain and Onboarding also suffers the onslaught of uncertainty. On delving deep into the situation, it was found that Onboarding as a process suffers at the hands of ownership issues. Even though the HR Department is at the helm of affairs, there are many other departments that are involved in rolling out the process. In a technology savvy age, gamification could be used to give a new turn to the Onboarding Process by focusing on performance standards and aiming at retention. Cross Boarding is another useful tactic that can be adopted by aligning Onboarding with learning. A good mix of tactical and strategic approach to Onboarding would lend a competitive advantage to the organization. (Claire Schooley April 2010) is of the opinion an effective execution of the process of Onboarding translates into efficiency for the organization at large. Onboarding process has its roots where the hiring process takes place, it moves on to the initial months of the employee on the job and continues throughout the journey of the employee with an aim to make the new joiners productive at the earliest and also to retain the talent. In the words of Karen Sones who works at FHN, Onboarding is the process of “acquiring, assimilating and accelerating new hires into the culture of the organization”. In short it looks at speeding up the paperwork formalities, paves the way for suitable training, lays down standards of performance and most importantly clarifies the expectations from the perspective of the role, department and the organization. Automation of the functions of Onboarding would prove beneficial in saving on time and cost. (Hillman 2010) establishes that Onboarding plays a key role in transitioning a new joiner into a long staying one. In order to attain this goal the employee should be made aware of the standard operating procedures at work in the organization and also adequate coaching should be made available to the new joiner. Providing a career path through training and development contributes towards making the employees’ stay valuable in the organization. The onus of a successful Onboarding program lies to a large extent on the attitudes and approaches of the organization handling it and having a standardized process across the organization is most beneficial. It is directly linked with the aspect of Employee Engagement. (Tedlie May, 2009) opines that the first day of the new joiner when he/she is oriented into the organization is of paramount importance.

PROCESS OF ONBOARDING

Onboarding programs are aimed at spiking performance levels of employees and attain a fit between the organization and the employee. A good role fitment helps improve job satisfaction and commitment, thereby resulting in a decline in turnover rates. As a consequence, greater emphasis is being laid on looking for innovative ways of getting a role fit. Although there is a deficiency of adequate research in the field, but Onboarding programmes are being looked at as a driver for person-organization fitment. Organizational socialization plays an important role in attaining job fitment through person-organization fit. (Pike 2014)

The reason why employers are concerned about curbing turnover rates is because costs incurred during recruitment, hiring and onboarding are high enough to impact the other employees working in the organization after some of them leave. The immediate impact is felt in terms of covering up for the lag in productivity owing to a decrease in the serving employees. Additionally, prospective candidates need to be interviewed, hired, trained and assisted, thereby taking away precious time and efforts, which could be directed towards productivity. This in turn could lead to decline in the customer satisfaction owing to lesser availability of employees to assist the customers. The loss incurred by the organization doesn't stop here. Knowledge management is a burning issue arising out of attrition, as not only does the organization lose valuable talent but also humungous amounts of historical knowledge useful to the organization. Productivity, of course is something, which no organization would like to compromise with, but has to inevitably, even if it is temporarily. **(Pike 2014)** Maslow's hierarchy of needs explains this better with its emphasis on all the needs present in the paradigm. As Maslow's Hierarchy of Needs is used very often in the field of Human Resources and behavioral analysis, it naturally translates into the different aspects of Onboarding Programme. It explains how each factor of socialization, on proper execution attends to every need in Maslow's hierarchy and leads to self-actualization for the employee through fulfillment. **(Pike 2014)**

Preboarding

This typically happens during the recruitment and selection phase involving all tasks administrative in nature up till the first day in the organization. For instance, a welcome message from the CEO of the organization forms a part of this stage. Such a gesture helps the new hire feel a sense of belonging; it is an act of inclusion into the family of the organization and drives home a very cohesive impression about the organizational culture especially when it comes from the senior management (Stein & Christiansen, 2010).

Organizational Socialization

Organizational Socialization being an important element determining and effecting person organization fit, it goes beyond the routine tasks. Socialization helps new employees achieve job satisfaction. In the words of (Stein and Christiansen 2010), in order to make Onboarding Programmes effective, four components need to be addressed. These components focus on the primary needs of the new hires (Stein and Christiansen 2010).

Culture

Understanding the culture and values of the organization is a vital for the new joiners. This enables them to align themselves to the larger goals of the organization and helps them figure out whether they fit in the organization. It clearly defines the performance standards, norms, ethics and the code of conduct (Stein and Christiansen 2010).

Network Development

This factor is helpful in facilitating interaction between the new joiners, coworkers and teammates, as it is important to break the ice with the people with whom they would work. It is essential because this provides a learning ground to imbibe different values, norms and processes that they would face time and again. Network Development provides access to resources and paves the way for resolving issues and queries (Stein and Christiansen 2010).

Career Development

Career Development aids growth of the employee in terms of a well-defined path within the organization. New hires place a high degree of importance to career development especially in the new organization. It is a two-way system wherein the organization can achieve retention by providing career development opportunities to the new joiners early enough, thereby giving the required impetus and motivation to strive for excellence and give the organization their best (Stein and Christiansen 2010).

Strategy

Strategy explains the contribution of the employee towards the organization in his/her attempt to achieve the goal of the organization. This enables new joiners to understand their own specific tasks within the larger framework of the organization. It helps to create a sense of self worth in the employee, as they feel responsible towards their goals and targets in line with those of the organization and also become responsible for the success of the organization, howsoever small it may be (Stein and Christiansen 2010).

Follow Up

A follow up with the new hire forms the penultimate element in the Onboarding Programme. It could extend up to the whole of the first year. This is particularly helpful in effective and useful communication for employees to clarify their doubts and perform their tasks with greater accuracy. This also enables the organization to get feedback with regard to the experience and satisfaction level of the employee and prove to be useful in improvising the existing process and bring it up to the desired level. (Stein and Christiansen 2010).

Assimilation

Assimilation happens when the new joiners are able to accept and incorporate the norms, values and ethics of the organization. Onboarding is essential because it is during the Onboarding process and the socialization process that the culture of the organization is communicated to the employee which thereby enables the employee to understand what is expected out of them and how they need to proceed (Pellet 2009). In order to convey the right information and ensure the right results, the organizational culture should be communicated accurately for compliance. The natural consequence of this is that the employee will either accept and align himself with the culture of the organization or detract himself (Pellet 2009). The socialization aspect and techniques of socialization should be looked into to have a better understanding of the Onboarding Programme.

A renowned firm XYZ LTD conducted an audit for ABC LTD, a well known IT firm. The findings of the audit were found to be dismal with regard to availability of the Physical Employee Records and the presence of Onboarding and Mandatory Documents in them. The issue at hand was to find out the extent to which the process was missing the mark and the reasons thereto. It was found that numerous slips and misses were made at various junctures of the process, right from the time of request for generation of Offer Letter.

The study is significant as it outlines the process as it unfolds by carefully mapping out the stages where discrepancies take place and resolutions for the same. The purpose of the study was to ascertain the availability status of the employee records of two different categories of employees, namely; On the Job Trainees and On Rolls; on the basis of physical verification of files to provide accurate figures with respect to the available and missing records.

Post that audit was done to check the availability status of onboarding and mandatory documents against the checklist provided to understand the level of compliance document-wise and employee-wise. This would enable the organization to have a better understanding of the deviations from the “To-Be” Process and would also help them nip the problem in the bud.

The Onboarding Process is made up of core and support groups. The Onboarding Team and the Hiring Manager/Buddy form the first support network. The core and support groups can be understood as concentric circles wherein the inner circle is what forms the first layer of contact with the candidate. It is this that is the first interface between the candidate and the organization. The outer circle is comprised of the Business HR along with the Talent Acquisition Team and the enabling functions. This group performs the support functions in the process. The entire Onboarding process at ABC LTD can be divided into three phases of activities, that is,

1. Pre-Joining
2. Joining Day
3. Post Joining

Pre-Joining

The pre-joining phase involves activities such as;

Generation of Offer cum Appointment Letter: Request for Offer Letter generation is sent out to Executives of PQR LTD, to whom the process is outsourced; who complete the formalities by satisfying the pre-requisites.

Pre-requisites for Offer Letter to be generated:

Approval such as

1. Candidate’s Acceptance of Offer
2. Joining Approval of Recruiter
3. Deviation Approval if any from Recruiter (for example College not listed in the League of Tier Colleges)
4. Early Joining Approval from Recruiter

Mandatory Documents such as

1. Curriculum Vitae/ Resume
2. Interview Process Form
3. Xth Certificate/Date of Birth Certificate
4. Photo ID Proof
5. Address Proof
6. Graduation/Post Graduation Certificate
7. Pay Slip of previous of Previous Organization (#)
8. Accepted Copy of Salary Compensation
9. Test Score (if applicable)
10. Offer Letter Checklist

In order to meet the pre-requisites, the following initiatives are followed:

1. Calls made/emails sent out to the Recruiters to provide the mandatory documents and the set of approvals needed
2. Follow ups with the recruiters
3. Recruiters contact the candidate to get the necessary documents

Action post conditions being fulfilled:

Tracker updated

Validation and Verification with regard to:

1. Educational Qualifications
2. Salary Annexure
3. Tier College Fitment

Issues Faced:

1. Documents not complete
2. Documents not clear
3. Salary Annexure
4. Grid Fitment
5. Position ID
6. Information and Position Request

After following all these steps the Offer Letter is released. During this phase the process owners are the Onboarding Team. The Talent Acquisition Team and the Business HR Team perform the support activities.

This is followed by **collection of pre-joining documents**. The candidate owns the process of providing the required documents. The Onboarding Team acts as the support function.

Post Pre Joining Documentation completion **asset allocation** takes place. The Enabling Functions own the process and the Onboarding Team supports the same by highlighting the requirements of the candidate on the basis of role assigned to the new joiner.

Joining Day

On the joining day, the candidate provides all the Onboarding Documents and the bank account is activated for the candidate. The SPoC assigned, checks the compliance and basis that authorizes the candidate's eligibility for further formalities. The Onboarding Team is the owner and the Buddy/ Hiring Manager is the support system provided.

Post-Joining

This phase comprises of two steps;

Induction (Owner: Training Team, Support: Hiring Manager)

Post Induction (Hiring Manager/Buddy, Support: Business HR)

The induction programme is aimed at appraising the candidate with:

1. The organization's policy
2. Hygiene
3. Standards of Excellence
4. Work Culture
5. People Practices

A brief overview of the organization as a whole is provided in terms of the different business components, which include;

1. Technology (IT Services)
2. Enterprise and Distribution (B2B, B2C, B2E)
3. Learning (e-Learning Kits for schools and colleges)
4. Miscellaneous Projects

The standards of excellence of the organization are communicated to the new joiners to ensure the same are respected and followed by them to ensure continuous improvement and quality. The drivers of excellence are:

1. People
2. Partner
3. Process
4. Products
5. Customer
6. Tools
7. Technology

This is aimed at ensuring international benchmarks and become employers of choice.

This is followed by communication of the Code of Conduct of the Organization, which emphasizes the thrust of the organization on. The Mandatory Policy of the organization focuses on Compliance, Data Security and HIV Workplace policies. As part of the Induction Programme, the new joiners are appraised about the Compensation and Benefits that they are eligible for. Post the information on Compensation and Benefits Structure the new joiners are made aware of the Talent Acquisition Policy, Talent Management Policy Talent Development Policy and Talent Engagement Policy; which form the four pillars of Human Resource Management. The prime objective of the Onboarding Process is to attain productivity on the very first day and to restrict deviations as far as possible.

Issues in As-Is Process	Resolution in To-Be Process
Time lag in completion of physical file Time Lag in creation of electronic file	Collection of Mandatory Documents before release of Offer Cum Appointment Letter Collection of all joining Documents on or prior to Date of Joining Regular Follow Up for receipt of pending documents within 7 days incase candidate already on boarded Hold salary for candidates failing to provide documents despite reminders till such time documents are furnished Creation of Physical/Electronic File in 7 days from completion of documentation

Renewal

Issues in As-Is Process	Resolution in To-Be Process
Generation of Letter manually	Generation of Letter on Alt
Absence of Dashboard for delayed cases	Inclusion of Dashboard in MCM Presentation

CONCLUSIONS AND RECOMMENDATIONS

FILE MANAGEMENT

Given the condition of the Record Room and the Records found therein following suggestions could be made:

- Owing to the ever-increasing size of the Organization and its human capital, space is a constraint, which could be worked upon.
- The general upkeep of the records is an issue that could be looked into, as too many records are stuffed together and are not placed sequentially.
- The wiring of the Record Room needs attention lest it lead to some hazard.
- Security is an important factor when it comes to records. Stringent regulations to ensure the same should be worked upon. Some Recommendations are:
 - Access to Employee Records needs to be controlled
 - Access to the Record Room needs authorization
 - Documentation/ Entries with regard to movement of files should be done at the time of receipt and sending of Records. (This was found wanting in the Record Room as a record of the files was missing)

ONBOARDING PROCESS

In order to improve the effectiveness of the Process of Onboarding, as opposed to sharing merely the Letter of Intent related details, the Offer cum Appointment Letter Details ought to be shared with the HR Shared Services by the Recruiters/Business HR Department.

As of now, only 80% of the requests pertaining to hard copies of Letter of Intent of Regular Employees and soft copies of Letter of Intent of Associates are completed. To step up process improvements, all requests for soft copies must be fulfilled, followed by submission of hard copies of documents.

To prevent delays Offer Letters could be prepared either on Alt or manually.

For getting the Offer Letter signed by the concerned authorities, the time gap for Service Level Agreements should be reduced from 2 days to the same day for all requests received on or before 2 pm or before 11 a.m. the next day.

In order to expedite and streamline the process further, the Talent Acquisition team could be advised to adhere to document and approval related issues more seriously.

The Offer Letter is mailed to the candidate directly with a mail marked to the Recruiter/Business HR via Enable. The same task can be performed using the Alt Portal and at the same time the "Asset Grid" can be prepared and configured on Alt on LOB/Grade basis. At this juncture preparation for Joining Day Activities can be done.


Instead of making the third connect call on a day prior to joining; the same exercise can be carried out 5 days in advance.

To further streamline the process on Joining Day, the list of candidates joining should be sent to at the Reception and to the Security Department. This would make the New Joiners feel welcome. A buddy could be assigned to the new joiner to help him find his feet once the Joining formalities are over.

For New joiners at locations other than main location, check back calls could be made once documents have been signed and couriered.

For speeding up the process of smart card generation, a new vendor could be considered at another location. An in-house printer at main location could also be considered.

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