Employee Onboarding Business Process Checklist
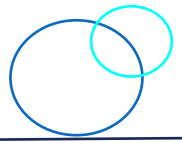
This checklist serves as a guide to take your employee onboarding experience to the next level with Microsoft 365 solutions!

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Summary

Many organizations have business processes requiring active involvement from more than one person. A process as regular as onboarding new employees can quickly become an arduous task if a clear and efficient process does not exist. A consistent means for delivery of information and documents to the new employee required for onboarding is as important as how they transmit their personal information and signed documents back to the organization. What if a company grew tremendously in size, hiring hundreds of people and did absolutely nothing to streamline the process? The results are clear: chaos and miscommunication in the form of digging through emails to find communication; documents not properly stored in a central repository (only to discover documents were stored on someone's laptop); or worse, no checks and balances of the required information properly captured from the new employee.

Ready to transform your business process?
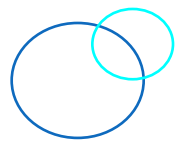
Challenge

In some organizations, there are no consistent means for how information is shared, received, and stored. Some organizations may have one or more competing platforms for storing company information. Are people following organization-defined best practices or do they circumvent the established process in order to find a more "convenient" way of working? How long does it take on average to onboard a new employee? Is one person the roadblock that holds up the entire process? Do people send documents in different formats, send information to different people, or exceed past required deadlines?
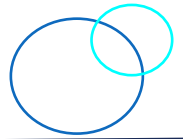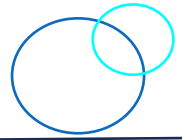
Process Checklist

Here is a checklist that can be used to evaluate your current onboarding process from a business perspective:

✓ **Identify if the entire onboarding process is clear to everyone involved and document the process.** Oftentimes, people who are not heavily involved in the process may get distracted with more pressing duties. Communicating and documenting the process will reinforce that their limited, but active involvement is required.

✓ **Identify who needs to be informed versus actively involved in the process.** When an unnecessary assignment of roles is assigned to too many people or if too many roles are placed on one person, this may create unreasonable burdens, which could circumvent active participation in the processes. For example, is it necessary to have five levels of approval on behalf of the new employee or does it only require one level of approval, which moves the process along faster?

✓ **Walk through the process by playing the role of the new employee so that their expectations and experiences are crystal clear.** This will also help the new employee transition well into the company versus experiencing roadblocks and challenges that prevent them from turning in documents and required information in a timely fashion.

✓ **Identify people that might be causing a bottleneck.** Give new employees the ability to upload or digitally sign their documents versus emailing the documents to a specific individual in Human Resources. This alleviates that particular Human Resources representative from remembering to save those emailed documents and store them in a repository.

✓ **Identify if there are single-person dependencies and have planned backups.** If the main resource was removed from the entire process (meaning they were unexpectedly on leave for an entire month) would the entire process fall apart? If so, more than one person should serve as a backup and the documentation mentioned above will level-set expectations for the backup person.

✓ **Most importantly, be sure to identify risks for industry-related audits.** There are industries with strict requirements on employee data, required forms, and security training. Keeping track of this important information and audit history will be key for a successful experience.
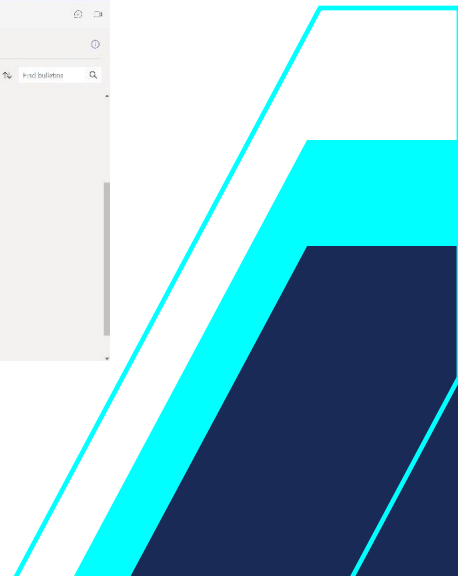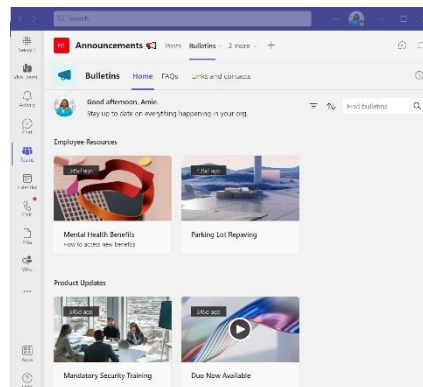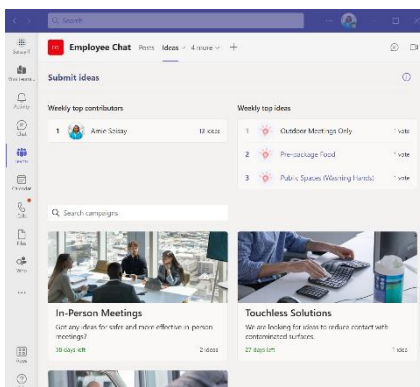
Solutions Checklists

These tools below can help transform your onboarding process into a much more efficient means of sharing information in a consistent manner with insights and visibility for Human Resource staff.

Simple Solutions:

✓ SharePoint sites can be leveraged as a means for allowing new employees to see announcements, access required training requirements, access benefits information and forms, and receive support. SharePoint Look Book (https://lookbook.microsoft.com) provides a few templates to get started with creating dynamic sites with rich content.
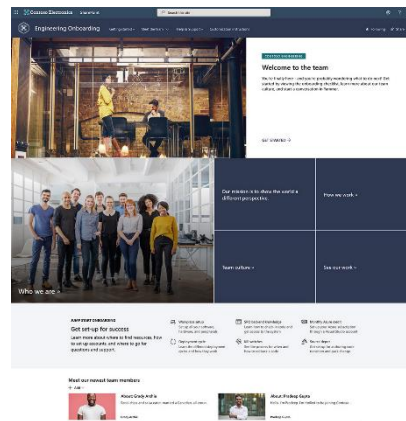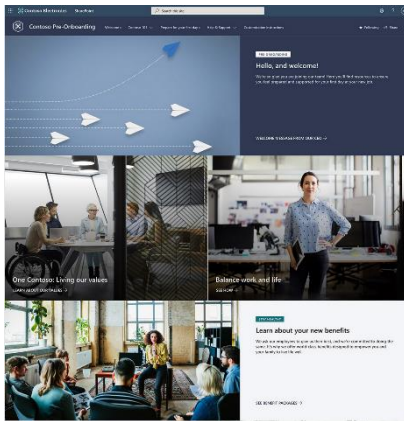
✓ Microsoft Teams can be leveraged if your organization wants to drive the usage of information sharing using the approach where topics are organized by channels and user engagement can be an interactive experience. Teams has a prebuilt template called "Onboard Employees" which includes Announcements, Employee Chat, Training channels automatically integrated with Yammer, Power Platform, Bulletins, Milestones, and SharePoint features.

✓ SharePoint checklists allow each employee to see tasks that are required for completion along with deadlines and timeframes. Completion status and completion dates can be updated as progress is made.
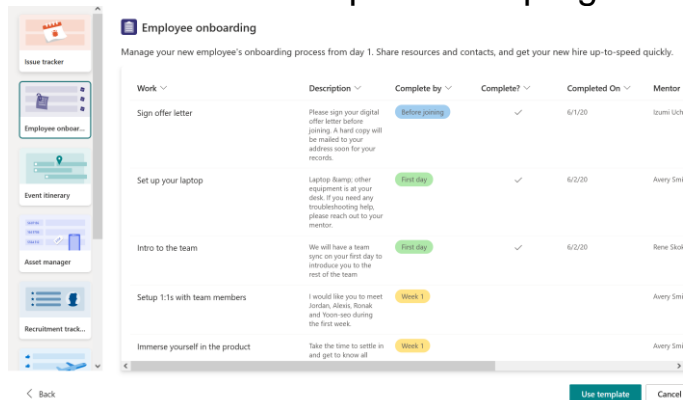

Advance Solutions:

✓ [New Employee Onboarding (NEO) app template](#) leverages Microsoft Teams chatbot experience, which has configurable variables for customizations: https://www.youtube.com/watch?v=-S_IHXWEobk.
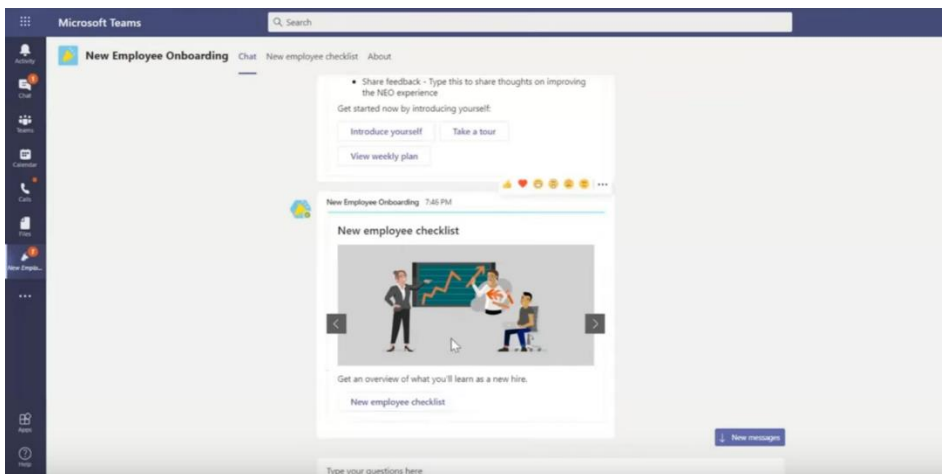
✓ Power Apps can deliver a dashboard customized for the Human Resources team. This app can be a highly customized approach to give quick insight into where each employee (across the organization) is in their onboarding process.

✓ Business process approvals and notifications of onboarding status and reminder emails can be configured using Microsoft Power Automate in Microsoft 365.

✓ Integration of Microsoft 365 with document signing tools, such as Adobe Sign, DocuSign, HelloSign, etc. allows for the capture of electronic signatures.

All of these solutions eliminate the guesswork of which stage an employee is in during the process. Automated emails remove Human Resources from remembering to follow up with people so that their time and attention are focused on more pressing matters. Finally, centrally storing all documents within Microsoft 365 solutions reduces the risk of compromising files on personal devices and exhausting time searching for documents and information. The efficiencies that Microsoft 365 offers are guaranteed to streamline and improve your processes!
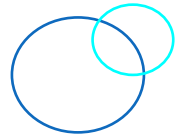
Next Steps

We'd love to hear your feedback and answer questions regarding this checklist and your business process!

Visit our website at https://www.seisayitsolutions.com.

Email us at contact@seisayitsolutions.com.