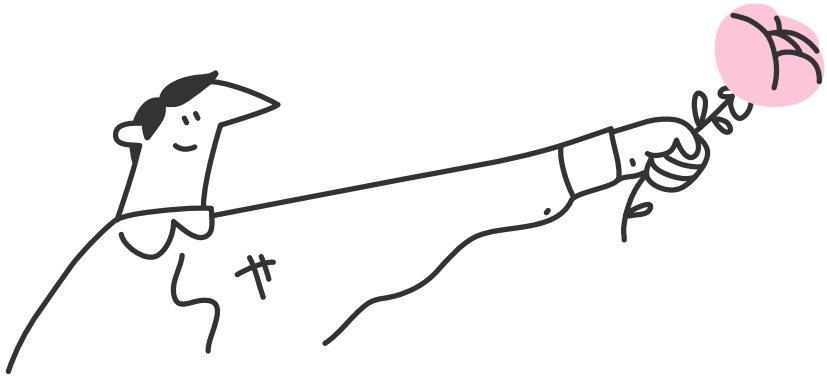
keka

Onboarding automation: the hidden gem of HR

Unleashing the Potential of Onboarding for Retention



Onboarding – the forgotten yet crucial post-hiring stage



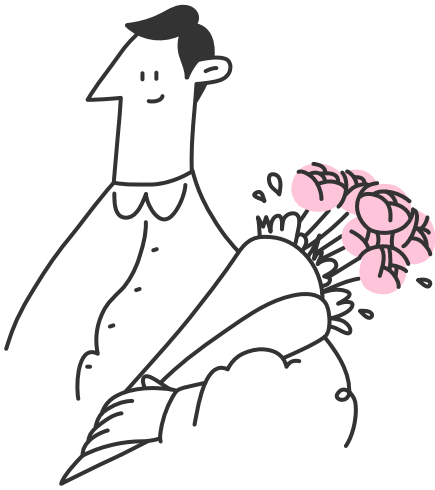
Despite its importance being emphasized by veterans, employee onboarding often remains a checkbox activity for most organizations.

- According to a Gallup study, only 12% of employees felt their company did a great job with onboarding.
- Overall, only 29% of new hires thought they were prepared and supported to excel in their new role. Clearly, there seems to be a lot of room for improvement.
- Ramya, an upright HR practitioner who handles the end-to-end execution of onboarding at a Fintech startup, was aware of these facts. However, due to a steep rise in the number of new joiners over the past six months, she was grappling with challenges related to physical and remote onboarding. Despite her meticulous planning, there would be something that would go awry, upending her plans for a perfect orientation day.
- She already felt stretched to the limit while she was onboarding a total of 7 new joiners in the last week of July. The upcoming month had more than 25 new employees joining the company. While she was happy with the numbers, she was anxious how would she handle the onboarding.

Unbeknown to her, the company's onboarding process was going to be tested the very next day, the form of a new joiner Ashok.

The excitement and revolutionary mindset of a new joiner

Ashok, a dynamic professional with expertise in digital marketing, was a recent addition to Ramya's firm. Charismatic and bursting with a fiery passion and ready to hit the ground running, Ashok had chalked out a plan to address major issues on the company website. Having won many awards for his proactiveness and initiatives, it only seemed natural to him that he would redefine and take immediate corrective steps to improve the lead workflow and nurturing cycle.



Ashok had realized that his job was not going to be easy. He had to fill in the shoes of the previous digital marketing manager, who had left the organization abruptly due to a personal emergency. During his recruitment, Ashok had successfully audited the firm's website and social media marketing and submitted his findings in a detailed study.

He was excited that finally, he would be doing something new and impactful after a dull phase.

A rude shock – and a downward spiral towards inactivity

Ashok arrived at the office filled with aspirations and the zeal to set the wheels in motion. He was looking forward to meeting his teammates. As he entered the office, he saw that the marketing team and his reporting manager were already in a meeting with what looked like the sales team. He couldn't hear the discussion, but it seemed very energetic and interesting. He was excited and had just taken a few steps toward the meeting room when the HR, Ramya had called him.

As they both exchanged polite greetings, Ramya handed Ashok a thick envelope containing several documents that he was supposed to fill. A little dismayed, he asked her, "Is it ok if we can do this later? I was really looking forward to meeting the team and Ajay, my reporting manager." I am not sure they will be available right now. Why don't you wait till they are done with the meeting, and till then, you get this documentation over with." She had replied with a bright smile. With no other choice, Ashok opened the envelope and started filling out the documents. By the time he was done, the meeting room was empty.

BAD TO WORSE –

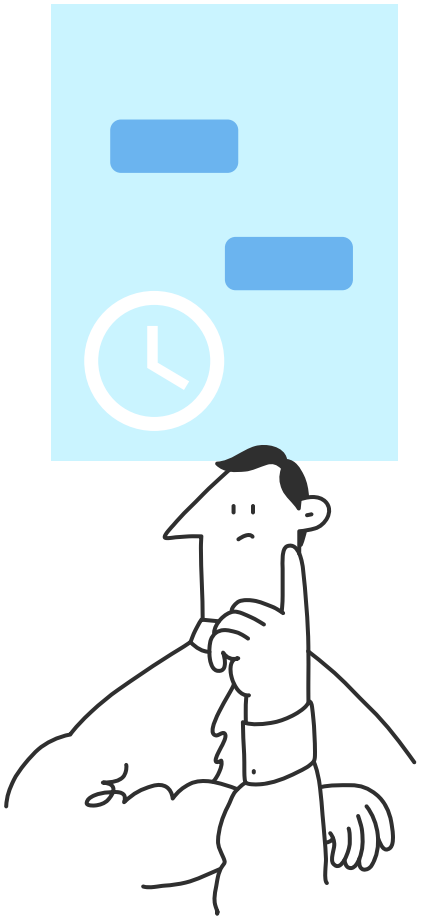
30 days of staggered productivity and lost momentum

By the time Ashok had finished his documentation, it was lunchtime. “We are working with the sales team for an upcoming IT networking event. We have partnered with the Times News Network as a Diamond Sponsor. That’s why everyone is occupied.” Ajay had explained.

The day had ended, and he had not even received his work laptop.

The next three days made Ashok seriously question himself if the organization really did need him. Three days had passed, and he still was at square one. He wasn’t able to connect with those he would be working with; he had literally nothing to do and was tired of re-reading the action plan that he wanted to present to Ajay.

What was worse was that there were no KRAs defined for Ashok. He felt like a rudderless ship with no sense of direction. Although this hadn’t stopped him from taking action and diving into work, he wasn’t sure if his contributions would be in line with the team’s predefined goals and plans.



A month had passed. Although the team had warmed up to him and his reporting manager was now trusting him with more critical tasks, Ashok didn’t want anyone else to go through this painful onboarding process. He had already interviewed several candidates, of which three were going to join soon. He didn’t want them to suffer the pain he did.

Benchmarking against the best –



FACEBOOK'S

45

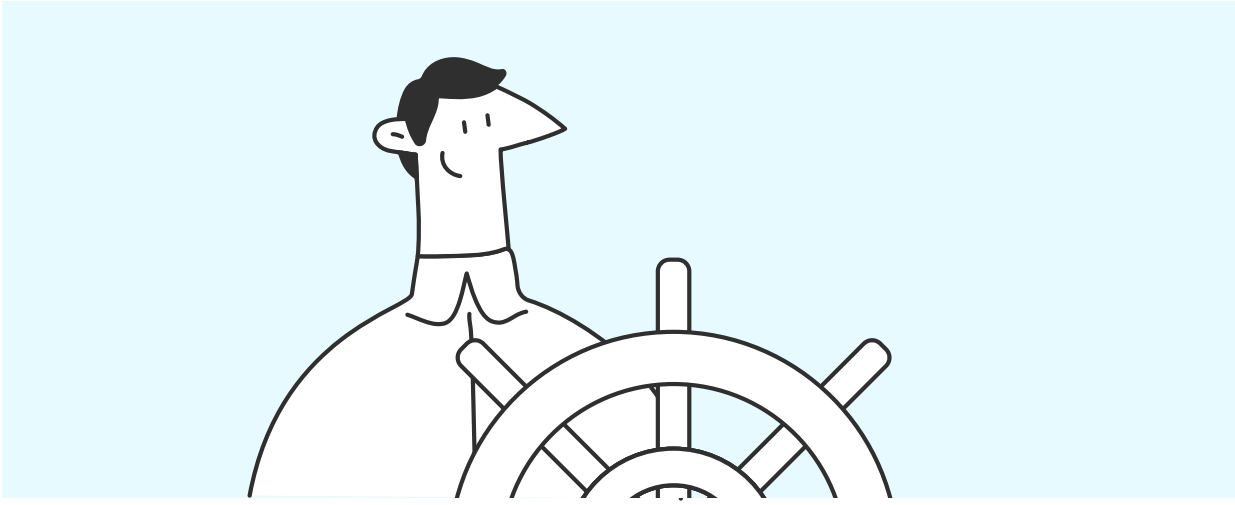
MINUTE RULE

As was his nature, Ashok took the initiative and had a chat with Ramya. Over a cup of coffee, he explained how his onboarding had created a negative perception in his mind and why it was essential to revamp it. Ramya also explained the roadblocks she was facing due to which she was unable to implement a foolproof onboarding process.

They talked about Facebook's 45-minute onboarding rule, where new joiners are equipped with all the equipment and materials needed to start work within 45 minutes of stepping into the office. She realized it was time to focus more on empowering the employees to do their tasks and set her benchmarks in line with Facebook's onboarding team.

She had a chance to speak to different department heads on how to tackle this issue, and gained advice on the simple core elements required for an employee to do their job. She created onboarding decks specific to each department with cross-function dependencies pertaining to the job. By this, she had come up with a flow which was specific to the department and the Seniority of employees.

Ramya dives into action, defines critical dependencies for employee productivity

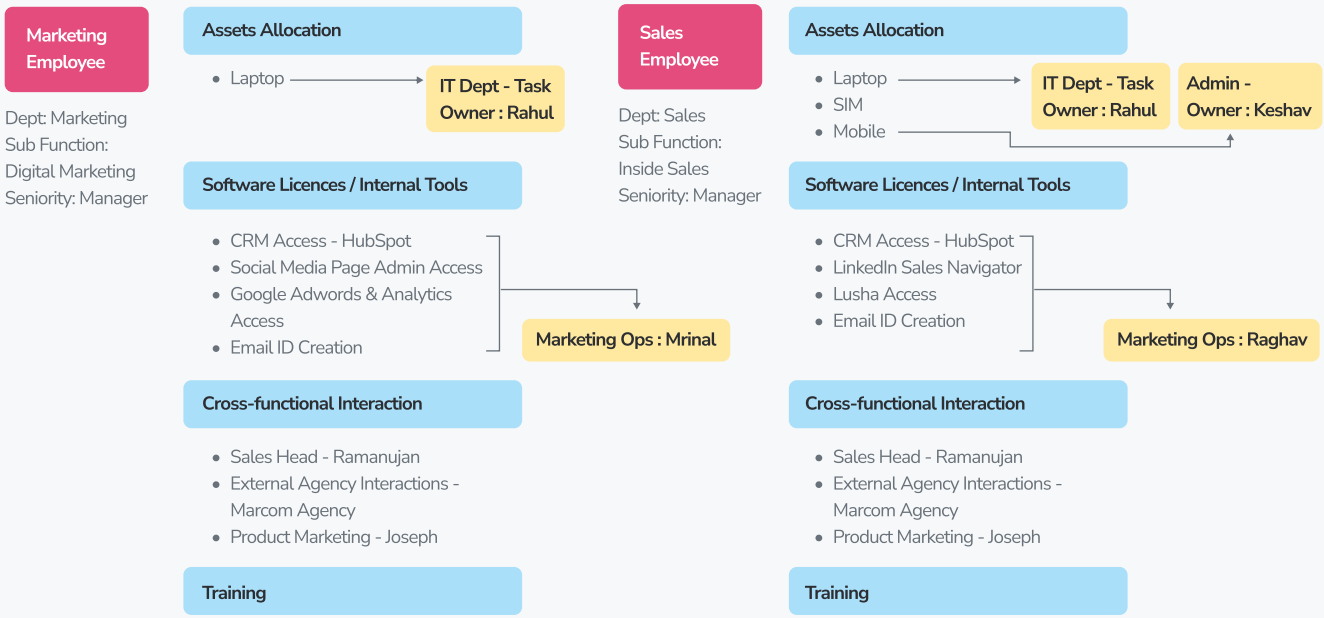


Taking advantage of pre-onboarding

A critical aspect to streamline and smoothen the onboarding experience was taking advantage of the pre-onboarding stage. Ramya had figured that she would get the daunting tasks such as document collection before the actual onboarding day, so that the new joiners would not be encumbered and could actually enjoy their first day. She built a process to automate pre-onboarding document collection and set reminders in case it was not completed by any new joiner.

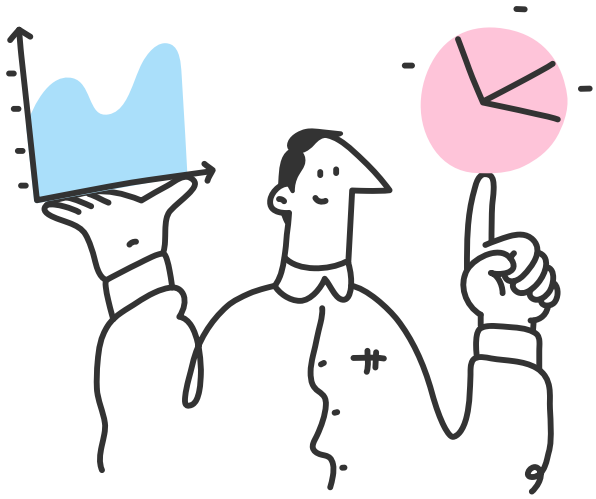


Employee onboarding workflow for sales and marketing managers



Tapping into the powers of automation

Ramya had figured out the onboarding flow, but she wanted to automate the process as she knew that handling the entire flow manually was not possible. She reached out to her friends and mentors from various organizations and did her own research to find the most suitable solution. Her search ended with Keka, a complete HRMS Platform with advanced integration capabilities.



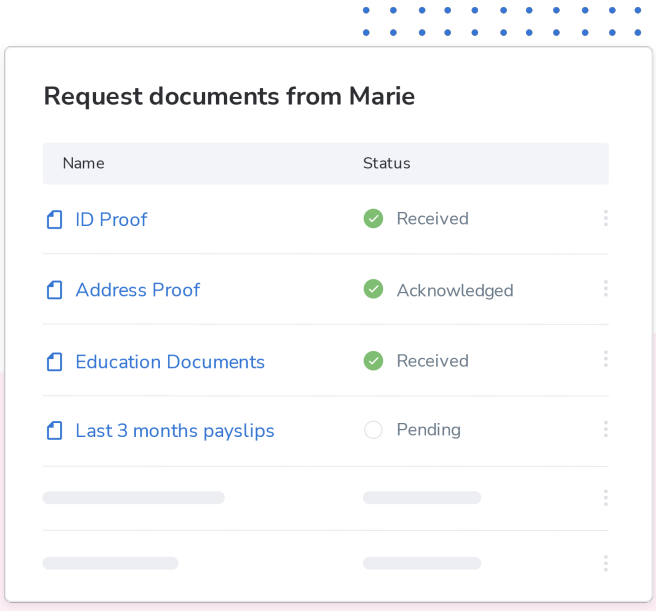
As she explored the platform in detail, to her pleasant surprise, she found that **Keka's onboarding module** helped her define the employee onboarding workflows just as the way she envisioned. The platform went several steps ahead, automatically triggering notifications at crucial touchpoints and enabling her to automate follow-ups. This meant she no longer had to worry about manually sending follow-up emails.

The masterstroke – Ramya creates onboarding groups customized for each department

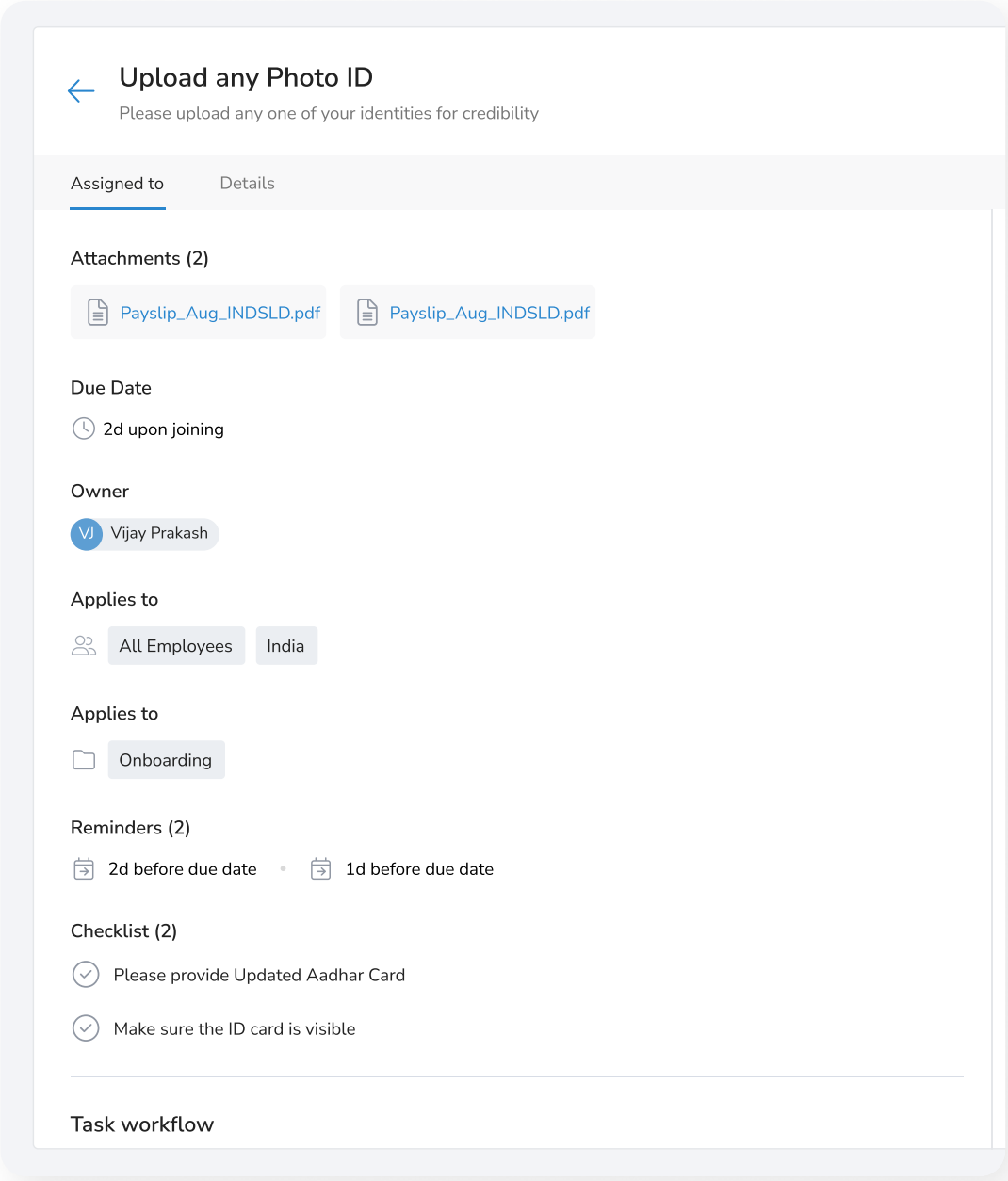
Ramya created multiple onboarding groups, each with a different onboarding workflow. Keka had empowered Ramya to create a customized onboarding workflow with the concerned employee, their reporting manager and the people they need to meet. In other words, she was able to map different onboarding processes with the right people, ensuring there was no disconnect throughout the cycle.

Pre-onboarding checklist with automated email triggers

A comprehensive pre-onboarding checklist helped Ramya in ensuring all the important documents were collected and stored in an organized manner. The system was capable of sending out timely reminders to the new joiners in case they missed out any document.

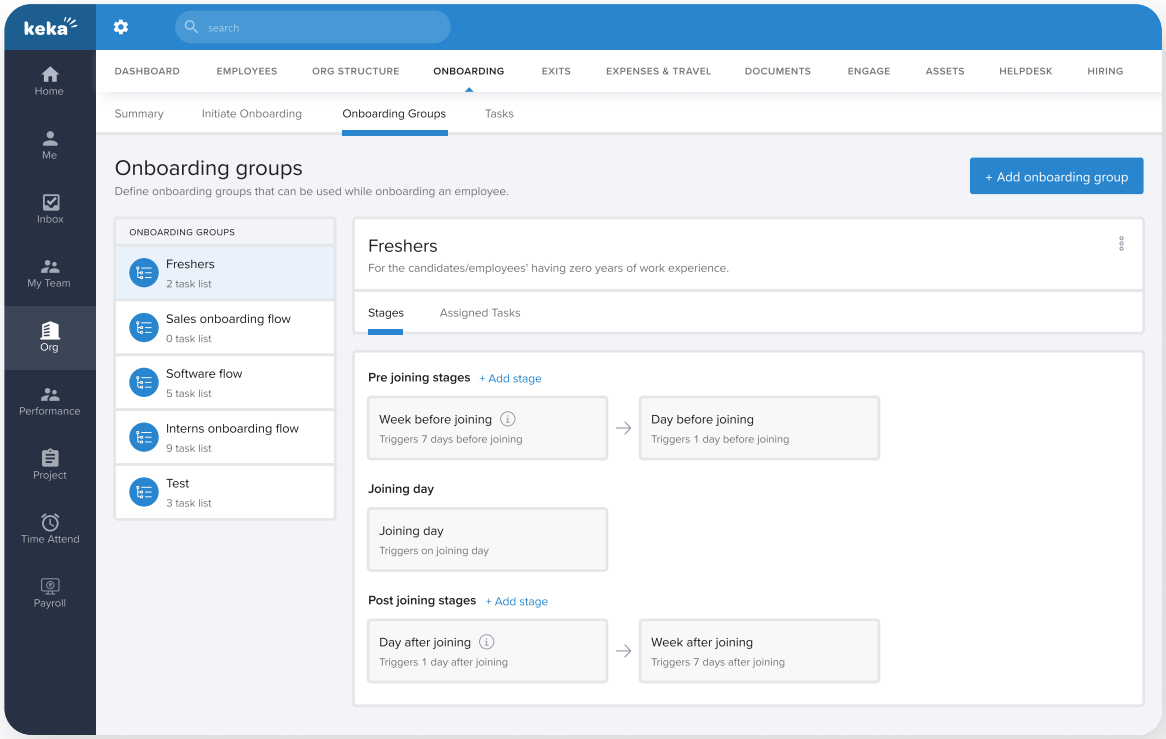


Pre-onboarding checklist with automated email triggers



Ramya sets up 2 Automated Reminders for critical tasks to ensure timely completion.

Customized workflows for senior team members in marketing



Ramya hits the jackpot with the 5-day onboarding rule

Having looked through all the processes and plugged all possible loopholes, Ramya was able to eliminate the onboarding delays that were plaguing her firm. She finally achieved her dream of empowering new joiners from day one. The process gained huge traction throughout the firm, with the CEO herself praising her initiative. Ashok had also congratulated her, happy over the fact that his feedback was acted upon.

5

day onboarding rule

The 5-day onboarding rule became the norm with the following tasks:

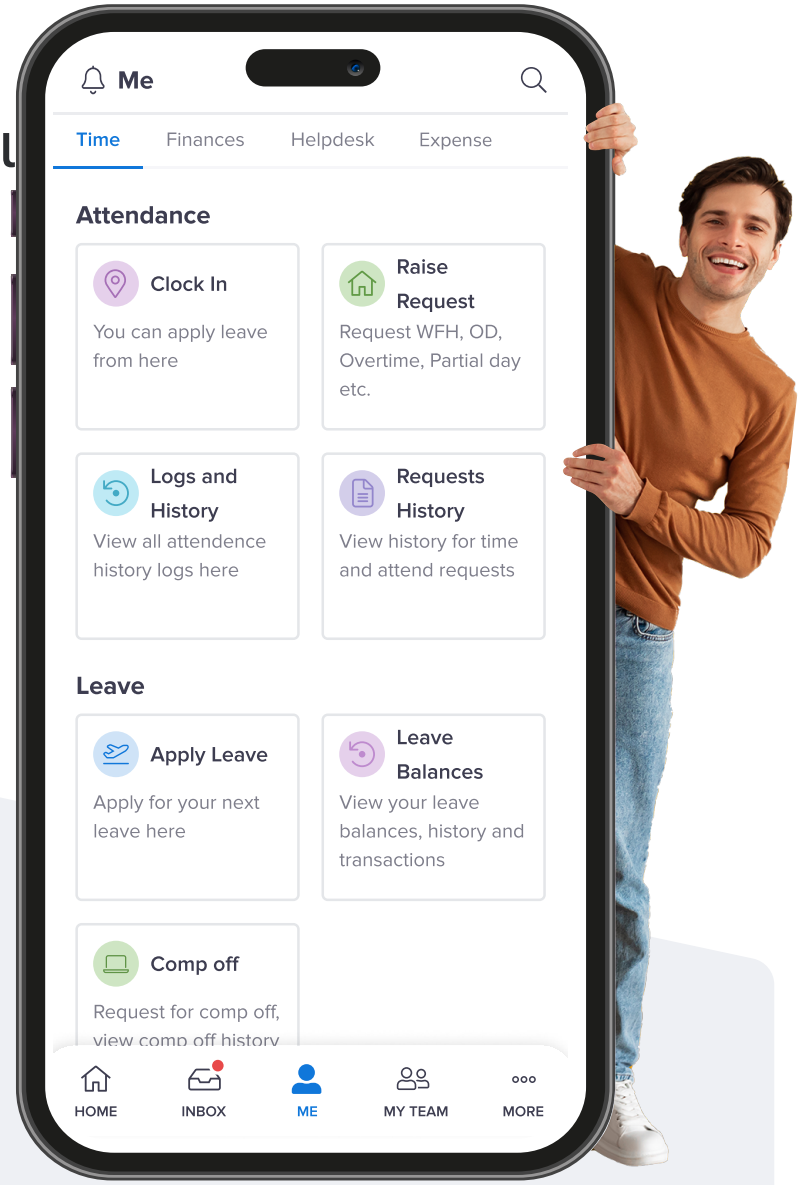


With the onboarding issue resolved, Ramya was now able to concentrate more on other strategic HR initiatives. However, with Facebook's 45-minute onboarding rule in her mind, she had decided that she would not rest until she brought her firm to the same level.

About Keka

Everything you need to buil a great company

Keka is your people enabler. From automation of people processes to creating an engaged and driven culture, Keka is all you need to build a good to great company.





Reach out to us!

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