

# The Pitfalls of Paper:

## *The Danger of Using Spreadsheets for Employee Onboarding*

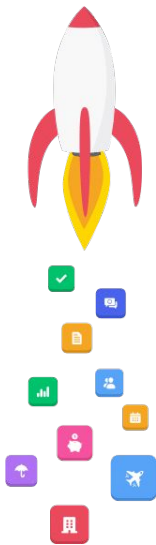
**Presented by:**

**Michelle Coussens | Business Strategist | Plan B Consulting**



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## About GoCo

Our mission is to help small businesses spend **less time on manual HR tasks**, so they can focus on growing **happier, more productive teams**



# Meet the Expert

## Michelle Coussens | Business Strategist | Plan B Consulting



Michelle Coussens is a frequently sought-after speaker and business strategist for numerous types of organizations on a wide range of topics related to the workplace, including but not limited to talent management, business strategy, and operational effectiveness.

She is a resourceful, resilient, and relentless business professional with demonstrated success in building new programs, driving short-term efficiencies, and improving long-term effectiveness all through innovation, rigor, and courageous leadership.

She has direct experience with a variety of industries, as well as in consulting, education, and not-for-profit organizations. With consistently high participant ratings, her webinars, seminars, and speaking engagements bring practical value to businesses of every size and type.

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## Session Deliverables

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- **Ways to create and ensure a smoother onboarding experience for your new employees**
- **Options to save precious time in order to focus on more value-oriented tasks**
- **How, and why, you should digitize your onboarding checklists and documents**
- **Tools you can use to streamline the transition to digitized processes, and how to decide which tasks to automate**



Ensure a smoother onboarding experience for your new employees

# Onboarding barriers

- **Outside hires are not familiar with where to find information and what they need to do when they start.**
- **Newcomers are not acquainted with your culture and therefore may have difficulty assimilating versus employees who transfer within the organization**
- **New hires need to become acclimated as fast as possible so that:**
  - The company can benefit from their contributions
  - The employee doesn't leave, necessitating a whole new search and hire

**20% of new hires leave within the first 45 days\*– Yikes!**

\*<https://www.smartsheet.com/employee-onboarding-processes-plans-best-practices-flowcharts>

# Winning onboarding brings...



Commitment To  
The Organization



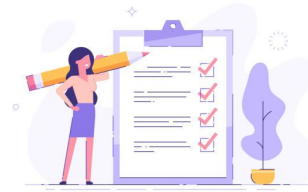
Job Satisfaction



Lower Absenteeism  
And Clock-punching



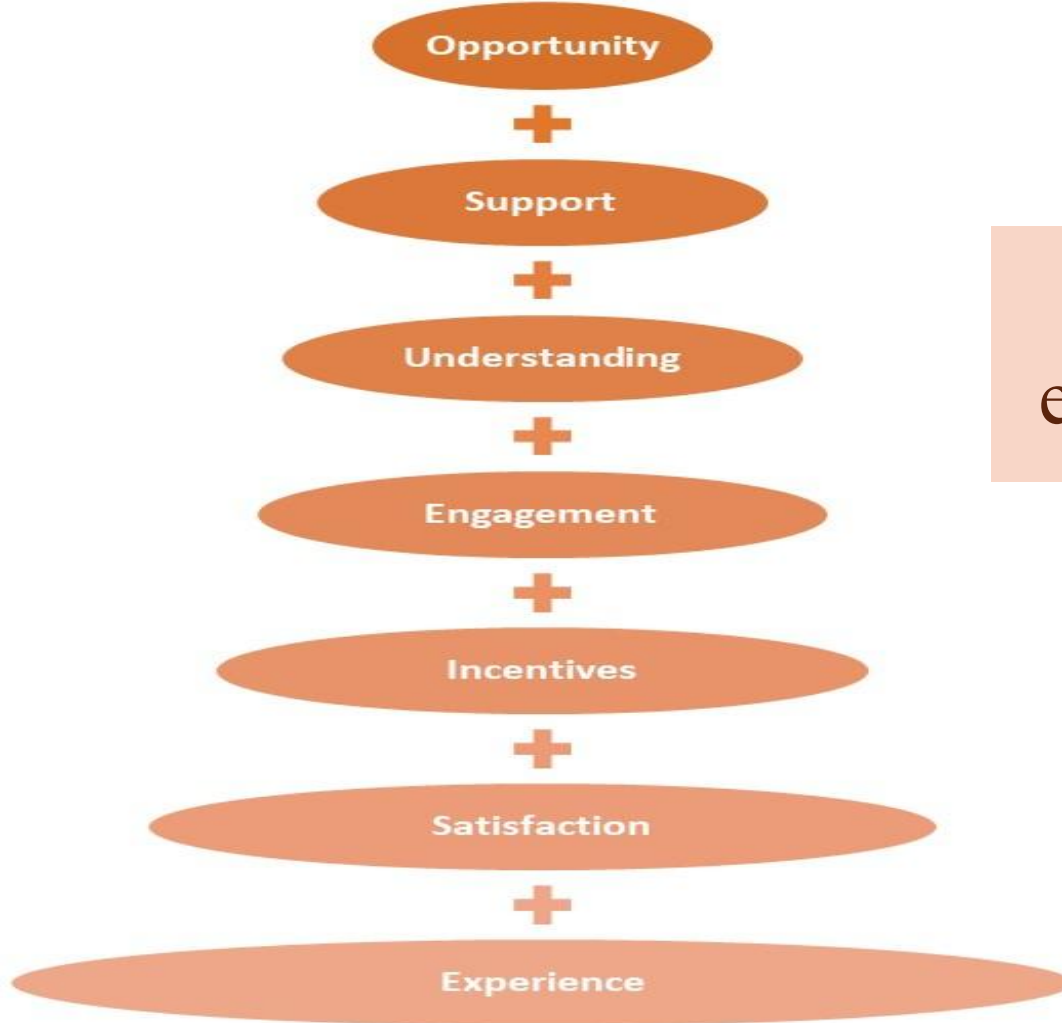
Better Communication  
And Camaraderie



Fewer Task-Masters  
More Context-Builders



# C U L T U R E



Drivers of the  
employee experience



# Questions to pose and strategize before individual onboarding

- **What do you want the new hire to do before they start? When they start? After they start?**
  - What will they want from you? What expectations will they bring from their previous experiences? How will you ensure that your reality matches your job posting and company marketing/branding?
- **What role will HR/you play versus their direct report manager? How are you engaging their manager in making decisions? How involved should the manager be? Can they be? How can you lighten their load?**
- **What will co-workers need to know and do? How will their efforts be acknowledged or rewarded? How will they still have time to get their own work done? What assistance do they WANT to provide?**

# Pre-boarding activities

- **Sending and completion of legal documents**
  - Tax forms, I-9 form, direct deposit, signed offer letter, job description, etc.
  - Encrypt emails containing sensitive information
- **Provision of employee handbook, benefits options, pay periods, passwords, email account, etc.**
  - Remote desk and computer/phone set-up
- **Create first week of online meetings and key events/activities**
  - Virtual meet and greets; orientation meetings
- **“Buddy” determination and welcome phone call with new hire**
- **Day 1 schedule, including log in info, purposes, and other attendees**

# Week 1 onboarding

- **Highlight key documents, procedures, and standards**
  - Include the organization's strategy, structure, performance, and people, as well as detailed operating plans, performance data, and personnel data
- **Discussion of company culture and associated artifacts**
- **Initialization of immediate training (as required), including provision of any associated technology needs**
- **De-brief meeting at the end of the week with HR and/or manager**
- **Online meetings with other areas/departments, as well as other internal/external stakeholders**
- **Electronic signing of agreement to employee manual**

# Month 1 onboarding

- **Schedule a time once every week to two-weeks for Q&A/catch-up**
- **Set performance goals for the first 90 or 180 days**
  - Make goals SMART
  - Be sure new hire understands priority order, as well as how to provide electronic updates and surface issues
- **Schedule virtual open-door meetings with the organization's leader(s)**
- **Celebrate completion of their first month with an online card or send a package to their home location**
- **Complete benefits enrollment process, if not done sooner**
- **Execute an on-boarding de-brief with the new hire, live or via online survey**
  - How was their experience? Suggestions for future new hires?

# Beyond Month 1

- **Check in once a month for each of the first three months**
  - With the new hire and separately with their manager
- **Address any outstanding needs or concerns**
  - Training
  - Resources
  - Questions/clarification
- **Include them on a cross-functional team or committee**
- **Later incorporate job rotation and/or year 2 projects/tasks progression**
- **Revisit onboarding debrief to determine if there are any additional insights**





Options to save time in order to focus on more value-oriented tasks

# Establish and maintain SOPs

- **SOPs (Standard Operating Procedures) assist in consistently making decisions and taking actions**
  - Provide effective first line of defense against potential of regulatory non-compliance
- **Identify and modify other ancillary, upstream and downstream processes**
- **Regularly review processes around expectations, gaps and issues**
- **Streamline and validate data collection at all stages of each process**
- **Consistently follow documented protocols while still addressing individual employee needs with decorum and sensitivity**
- **When updating procedures, make changes in documentation, plus:**
  - Update HR staff roles: **Modify, eliminate, or create new**
  - Build HR staff skills: **Technical training, soft-skill development, workload balance**
  - Must have, update, and communicate an HR Manual in addition to internal HR procedures



# Increase your efficiency and effectiveness

- **HR workflows represent typical tasks in talent management.**
- **Determine how to eliminate unneeded steps and activities**
  - Flowchart the elements of your SOPs
  - Do a time survey to determine how time is actually being spent
- **Where can you eliminate manual processes and upgrade to automated systems?**
  - What is the best automated system that will work for our organization
    - What do you want the system to include?
    - What systems are available to meet your needs?
  - Consider providing a centralized portal for submitting, approving, and tracking HR requests

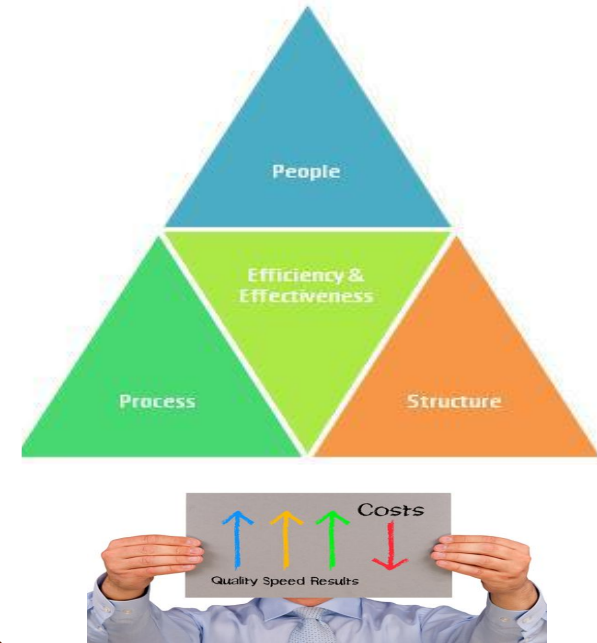




How, and why, you should digitize your onboarding  
checklists and documents

# We must be both efficient and effective.

- **Operational excellence requires a continuous improvement mindset.**
  - Work on the right things.
  - Ensure access to the right resources.
  - Identify and eliminate waste day in and day out.
    - Waste is anything that does not add value.
    - Before waste is removed, processes are usually scattered and unorganized.
    - After waste is eliminated, processes are streamlined, which results in satisfied managers and employees, while saving the organization time and money



# Streamline paperwork

- **If it must be on paper...**
  - Use color-coded binders or tabs to organize items
  - Purge unnecessary items in line with record retention requirements
  - Differentiate between stored files and active files
- **Move paper to electronic**
  - Invest in scanning tools to transfer information
  - Consider digital pens
    - **Data automatically digitized, converted to text, and forwarded**
- **Map your processes to identify opportunities to cut steps or handoffs**

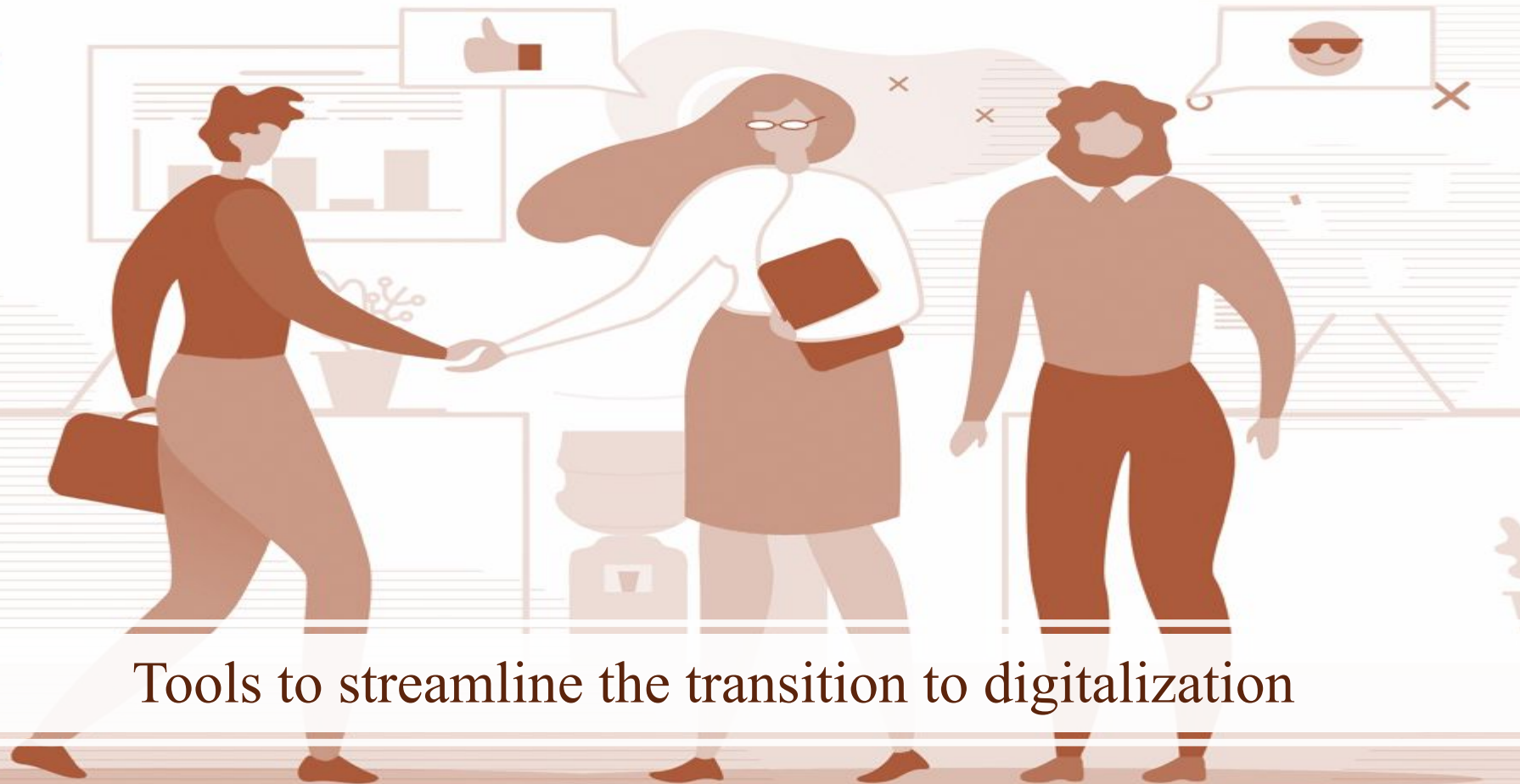
# Better manage your HR data

- Data storage has a cost and risk
- **Online** file cabinets also save on space
- **Cloud computing in HR provides centralization of information.**
  - Retrieval any time, anywhere
- **Technology facilitates secured, encrypted storage**
  - Plus, easy search capabilities
- **Facilitates data-analytics**



# Company benefits of smart technology

- **Eliminates repetitive internal support processes**
  - Production processes, including composition engines and workflow
- **Sophisticated, mechanized dashboarding, data analytics, and reporting**
- **Affordable, easy access for all sizes of businesses**
- **Fewer manual functions and better access, sharing, and assessment of data to make better decisions while complying with legal and other requirements**
- **Higher accuracy, efficiency, and visibility of data and information**
- **Expedites your company's employee communications**



Tools to streamline the transition to digitalization

# HR technological trends & advances

- **Employers spend over \$5 trillion on payroll, benefits and other systems. Including:**
  - More than \$250 billion on recruitment, advertising, assessment and interviewing.
  - \$220 billion+ on onboarding, leadership development, technical skills, and continuous improvement.
  - Similar magnitudes for wellbeing, benefits, insurance, workforce tools, and productivity systems.\*
- **HCM platforms, IoT, cloud-based storage, AI-based tools, new vendors entering the HR/HRtech space, robotics, chat bots, cognitive hints/nudges, integrated messaging, natural language processing, etc.**
  - Embedding of HR systems into broader productivity systems.

\*(Bersin, 2019-2020)

# Use technology to enhance communication and trust

- **Technology has furthered candidate and new employee access to HR-related information**
  - What it's like to work at a certain company
  - What the salary levels and benefits are like
- **Transparency drives heightened productivity and results**
  - Enhance your understanding of your workforce
  - Help you learn from ongoing feedback
  - Improve recruiting, onboarding, retention, and skill and career development
- **Technology can assist in sharing information aggregately and appropriately**
- **Advantages to incorporating technology/tech vendors in onboarding:**
  - Save time and money
  - Faster employee access to information and support
  - Real-time training and access to automated demonstrations
  - Easier new employee access to people in multiple locations and departments
  - Electronic signatures and data storage adhering to privacy requirements
  - Built in compliance updates



# Automate manual HR tasks so you can focus on people



- **Eliminates repetitive internal support processes**
- **Sophisticated, mechanized dashboarding, data analytics, and reporting**
- **Affordable, easy access for all sizes of businesses**
- **Less data entry and better access, sharing, and assessment of data to make better decisions while complying with legal and other requirements**
- **Higher accuracy, efficiency, and visibility of data and information**
- **Can assist in streamlining routine/mass employee communications**
- **Artificial Intelligence (AI), in particular, can help**
  - Involves ways that computers can do things in lieu of human manual effort
  - Facilitates information access
  - Analytics: using tools to analyze raw data and derive useful insights
  - Data mining: technique for looking for hidden patterns and unknown relationships in data
  - Provides workflow and collaboration tools

# Examples of how onboarding tech can help

- **Today's tech options minimize the amount of manual work**
  - Reduce the chance of problems, delays, omissions, and legal or other inconsistencies
- **What can they do?**
  - Complete legal forms digitally, and in advance
  - Provide information about their department and co-workers
  - Answer commonly asked questions and/or provide a digital chat agent
  - Allow for customized work-flows based on position types or evolving organizational needs
  - Set-up and send automated reminders to various participants regarding assigned onboarding tasks
  - Track and document completion and status of onboarding steps
  - Incorporate videos and/or simulations
- **Leaves more time for socialization and training**

# Use technology in new hire benefits enrollment

- **Combines big data, artificial intelligence (AI), and expert assistance while alleviating the need for as much HR/human interaction**
- **Advantages**
  - Allows employees to discover, choose and use the programs that can best meet their unique needs
  - Increases employee wellness, and consequently productivity
  - Improves employee and employer benefits return on investment
  - Initiates engagement with employees with the right information at the right time
    - Before, during, and after enrollment
    - Mobile-friendly interfaces
- **Automates upfront and follow-on traditional HR activities**
  - Example: automation of eligibility timing rules

# Determine your net benefits of HR tech vendors

- **In purchase decisions**

- Is the solution user-friendly? Push-based or pull-based?
- Are there reliable measures that demonstrate how it can benefit your organization?
- Is it flexible? Can it be easily updated? Expanded?
- Is customization required to meet your needs? How will that be
- **Consider “soft,” indirect costs, such as:**
  - Transition and change management costs
  - Implementation costs (including time)
  - Potential HR staff replacement costs

- **Conduct cost-benefit analysis**

- Cost-benefit analysis is used to weigh the financial and nonfinancial costs and benefits.
- Nonfinancial or qualitative data is often assigned a value.
- There are many ways to do this, from a simple T-chart to a detailed financial analysis.
- A “break-even analysis” is done to

# Let technology help you stay compliant

- **Staying current is more imperative than ever**
  - (Post) pandemic effects and obligations
  - Notification standards, required forms, etc.
  - Privacy and other legal concerns regarding creation and usage of employee data profiles
  - Various hiring and ongoing employee legal HR concerns
- **Comply more easily through vendor support and/or technology resources**
  - Statutorily required information
  - Even contract language requirements for contractors/contingent workers

# Today's Takeaways...

- **Consider the benefits of technology options to new hires and your company and how they can help support optimum onboarding experiences**
- **Periodically evaluate and continuously streamline your processes for better efficiency and effectiveness**
- **Establish metrics and systems of measurement to monitor your process**
- **Collect feedback from new hires in order to continue to evolve your onboarding process to retain the people you hire**



# Let's stay in touch!

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