

HR's Guide to Onboarding

From Decision to Day One and Beyond



A Look Inside...

3 Candidate Experience

Every single touch point that occurs between a job prospect and an organization defines a candidate's unique experience. Onboarding is the final step in the hiring process, and one of the most important.

5 The Journey Begins

What's the most memorable day on the job? Think back to your own experience from your first day flipping burgers or interning as a teenager, to your current position. Many days are a blur, but one always stands out: the first.

7 Impact of Onboarding to the Bottom Line

New employee onboarding programs can have a positive impact on your business's bottom line. A great experience goes a long way in building brand loyalty from inside.

10 Importance of Employee Engagement

In a global economy and with the changing landscape of employee bases, it is even more important to understand and improve the employee experience.

13 Onboarding Best Practices

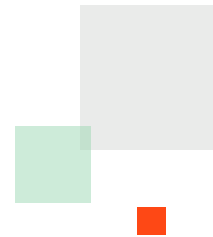
Structure a process that will optimize everyone's time, create a smooth transition for the new employee, and set the stage for a long, productive tenure.

19 Technology with a Human Touch

Onboarding is a people-oriented process that demands time and energy. Technology can help facilitate this process, but not replace it.

24 Onboarding with Sterling

Sterling onboarding services streamline and automate all the critical and time-sensitive tasks associated with bringing a new hire into your organization, while providing a great experience for all involved. Our cloud-based software delivers current forms and Sterling experts help you navigate compliance complexities.





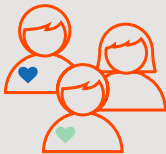
Candidate Experience

Every single touch point that occurs between a job prospect and an organization defines a candidate's unique experience. Touch points include career website visits, application processes, conversations with recruiters, interview scheduling, career fairs, and job offers. Organizations aim to deliver both a consistent and positive experience for every prospect. The desired cumulative impact is an across-the-board reputation as a strong recruiting organization, which will result in hiring better-quality talent.

With all that they wrestle with during a global crisis, today's candidates need the most unencumbered path to hiring and onboarding. When positions become sparse, it is even more important that businesses make the candidate experience the most positive and rewarding it can be. Without question, candidate experience has a direct impact on business from an organization's reputation to its profitability.

The candidate experience starts even before an employment offer is made – it begins during the pre-onboarding recruiting phase. Providing your candidates with a seamless and modern hiring and onboarding experience is important. Only 12% of respondents to a Gallup¹ survey indicated they believed their company did a good job of onboarding new employees.

Candidates who have an overall negative hiring experience will take their allegiances, product purchases, and relationships elsewhere. Negative experiences impact employer brand and can also diminish their ability to attract the “perfect-fit” talent for their company. Likewise, if candidates have a positive experience, they will continue to cultivate a relationship with a potential employer.



Remember:

Onboarding is not just a function of the Human Resources department. It takes a village to onboard a new employee. Good onboarding requires input from many different members of an organization, from leadership to site leaders to IT, and even Marketing. There has been a shift to re-classify the HR team as “Talent Team,” “People Team,” or the “Employee Experience Team.” Howsoever an organization names their teams, it all comes down to having the best candidate and employee experience from recruiting to day one.

Source: ¹ www.gallup.com/workplace/238085/state-american-workplace-report-2017.aspx

First Impressions and Pre-Onboarding

First impressions matter. For candidates, this means presenting themselves in a positive way during the interview process and throughout all touch points. For employers, this means demonstrating company values to candidates. This starts with showing candidates they are engaged with a modern and forward-thinking company by using the latest tools, such as identity verification, robust background screening processes, having a strong social media presence, and other forms of candidate engagement reflecting company values. An organization that is committed to communicating corporate culture to everyone in an online sphere demonstrates a great deal of transparency that is often sought by prospective employees. By verifying candidate identity and incorporating robust background screening tools, employers show candidates that they are engaged with a progressive company that incorporates technology into the pre-onboarding process towards providing a safe workplace and building trust.

Candidate Experience and Onboarding

Onboarding is the final stage in the hiring process. This stage includes sending the offer letter, onboarding paperwork, and first-day activities. Onboarding solutions have an immediate impact on candidate experience and overall organizational success. The time between the interview and the offer is critical. It is important to keep the timeline tight and on point to remain competitive in a hiring market.

When onboarding goes well, the benefits directly impact organizational success. When onboarding goes poorly, employee morale and engagement are at risk. According to the 2019 Talent Board North American Candidate Experience Research Report¹, an impactful approach must include a positive candidate experience from start to finish.

A strategic approach should include:

- Upfront identity verification: verify candidate identity during the pre-onboarding phase to demonstrate commitment to creating a safe workplace
- Process automation: forms, tasks, and processes that are required for a team focused on compliance, and should be automated to provide new employees with the information they require
- Engagement and responsiveness before the start date: engaging with candidates prior to their first day can get them excited and (at least in the short-term) help increase retention of employees
- Request feedback from candidates: understanding and acting upon candidate feedback can improve retention in the long run

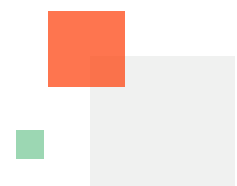
Here are some interesting insights from the 2019 Talent Board North American Candidate Experience Research Report¹:

37% of employers said they send specialized marketing communications to their hired candidates.

55% of candidates said that less than one week elapsed between their last interview and their official extended offer.

41% of candidates were not invited to provide any feedback during the journey at all.

26% of candidates report that they were asked for feedback before their start date, which had a direct correlation to their interest in the business. These individuals were 208% more likely to enhance their relationship with the company.



Source: ¹ 2019 Talent Board North American Candidate Experience Research Report



Onboarding: The Journey Begins

What's the most memorable day on the job? Think back to your own experience, from your first day flipping burgers or interning as a student, to your current position. Many days are a blur, but one always stands out: the first.

For both the new hire and the employer, there's a lot riding on the first day. Either all the expectations and promise of the interviews will come to fruition, or hopes will be dashed.



Onboarding: What It Is

At its most effective, onboarding tells a cohesive, compelling employer brand story. It engages and socializes your new hires from the moment they step through the door. And it lays the groundwork so that your new employees can become productive, successful team members for the long haul.

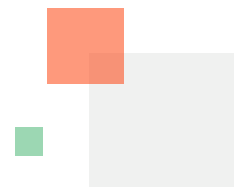
Most employees decide whether to stick with a job within the first six months. Day one is where the rubber meets the road. Make the first impression a good one!



Onboarding: What It's Not

Gone are the days when a new hire's first day consisted solely of filling out benefit forms and perhaps attending an orientation. Although an effective onboarding process should include some or all of the following, it is more than:

- A welcome packet
- A meet-and-greet with leadership
- An orientation or training session
- A team-lunch
- A first-day gift bag
- A get-to-know-you game





The ROI of Onboarding

You can't afford not to invest in an engaging, inclusive program that bridges the gap between recruiting and a new hire's transition into your organization. Here's how a solid onboarding program impacts the bottom line:

Engagement: The 2019 North American Candidate Experience Research Report showed that 85% of employers plan to make optimizing the candidate experience a key recruiting effort in 2020.

Data shows that a positive experience from initial contact to new hire onboarding can lead to better productivity and employee retention. This begins before the new hire's first day. Modernize the candidate experience before they start the job by incorporating identity verification into the process and demonstrate your commitment to creating safe workspaces using convenient, modern solutions.



Recruitment

By providing a positive, engaging experience in a competitive hiring environment, your organization will gain an edge in the war for talent.



Empowerment

Aided by a technology solution, your talent acquisition and HR teams can stop wrangling paperwork and start creating dynamic onboarding programs.



Performance

An effective and inviting onboarding process boosts engagement. Studies show that highly engaged employees deliver better customer service, building longer term brand affinity and loyalty.²



Employer Brand

Your new hire is sure to be asked, "How's the new job?" Thanks to Glassdoor, Facebook, Twitter, and other social channels, your reputation as an employer is riding on the answer.

Sources:

2019 Talent Board North American Candidate Experience Research Report

² Applauz Recognition: 3 Ways Employee Engagement Drives Customer Satisfaction November 22, 2019

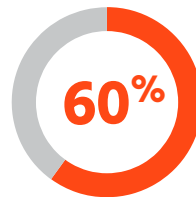


Onboarding's Impact on the Bottom Line

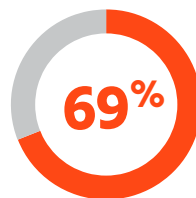
Solid new employee onboarding programs will have a positive impact on your business's bottom line. It helps an organization attract and retain the best talent and empowers the Human Resources team to focus on finding, recruiting, and securing the best talent for the company. Effective onboarding tells a cohesive, compelling employer brand story. It provides the skills, knowledge, and tools your new employee needs to become a productive, successful team member for the long haul. Good onboarding practices can turn the new employee into a brand ambassador.



Up to 20% of employee turnover occurs in the first 45 days after being hired¹. By implementing a strong, standardized onboarding process, companies can experience 62% greater productivity and 50% higher retention among new hires².



60% of companies do not set early, short-term goals for their new hires. However, establishing early metrics and "wins" during the onboarding process can help establish realistic expectations for the future².



69% of employees are more likely to stay with a company for at least 3 years after experiencing a great onboarding experience¹.

Sources:

¹ O.C.Tanner: An Onboarding Checklist for Success, 6 Engagement Strategies For the First Year, September 2018

² Harvard Business Review: To Retain New Hires, Spend More Time Onboarding Them, December 2018

Cost of a Bad Hire

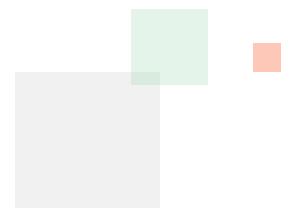
The financial implications of a bad hire can seem endless. There is the cost of “off-boarding” the associate, which can escalate quickly if it is not a smooth departure, plus the cost of recruiting, hiring, and training a replacement. A slim 19% of new hires are considered fully successful by employers and by 18-months on the job, about 46% of employees

are actually considered failures by the business¹. Not to mention the cost of bringing someone into your business who may be intent on causing harm. Identity-related fraud is on the rise – there were 45,500 instances of employment or tax-related fraud reported in 2019 – so it’s critical to know the true identity of all new hires before they join your team.

Here’s a top-level calculator to arrive at the potential cost of bad hires²:

Assumption: 100% of applicants are potential customers and/or influencers affecting revenue and referrals.

A. Annual hires	1,000
B. Applicants per hire	100
C. Rejected applicants per hire (B - 1)	99
D. Annual rejected applicants (A x C)	99,000
Negative resonance factor = candidate tells 1 person (at a minimum)	
E. Total rejected candidate audience (D x 2)	198,000
F. Average value of a customer	\$100
AT 14% candidate resentment rate (based on North American candidates willing to sever the business relationship):	
G. Potential lost customers (14% x E)	27,720
H. Potential lost revenue at 14% (G x F)	\$2,772,000



Sources:

¹ Consumer Sentinel Network Data Book 2019

² 2019 Talent Board North American Candidate Experience Research Report

A transparent and engaging candidate process:

All applicants are also potential customers and can influence reviews and revenue. Therefore, a positive candidate process presents an opportunity to lessen the negative statistics for retention, while increasing the potential for growth in the overall business as candidates have a positive experience².

An organized approach to facilitate internal mobility: Deloitte's 2019 Global Human Capital Trend called businesses to continually connect to their current workforce to ensure they are organizing the people across departments and needs in the most effective manner possible. Rather than just offering rewards or perks, businesses can build retention and business growth by evaluating job fit, design, and meaning for accurate placement².



42% of referred candidates state that they are more likely to increase their relationship with a potential employer by applying again, referring other candidates, and or make purchases³.



Sources:

¹ Harvard Business Review: What to Do When You Realize You Made a Bad Hire August 2018

² Deloitte's 2019 Global Human Capital Trend report

³ 2019 Talent Board North American Candidate Experience Research Report



Importance of Employee Engagement

Understanding and improving the employee experience is critical for companies operating in a global economy. According to Deloitte’s 2019 Global Human Capital Trends report¹, businesses need to keep up with evolving employee expectations by understanding and then championing the skills, motivations, and capabilities of the current workforce.

Today, many organizations are investing in programs to improve the daily employee experience through additional perks and a defined work/life balance. However, this recent data suggests that there is more value to employees today in highlighting and improving the work itself. Instead of providing support or bonuses, companies should seek to define and improve the job fit and meaning across the organization.

All segments of the workforce, from freelancers to full-time employees, from contractors to remote employees, expect the employee experience to be designed to attract and engage them. This should begin right away, by creating onboarding programs that help employees engage with one another and understand how their roles work together. As a result, this can lead to office friendships which have a very positive effect on productivity and overall satisfaction.

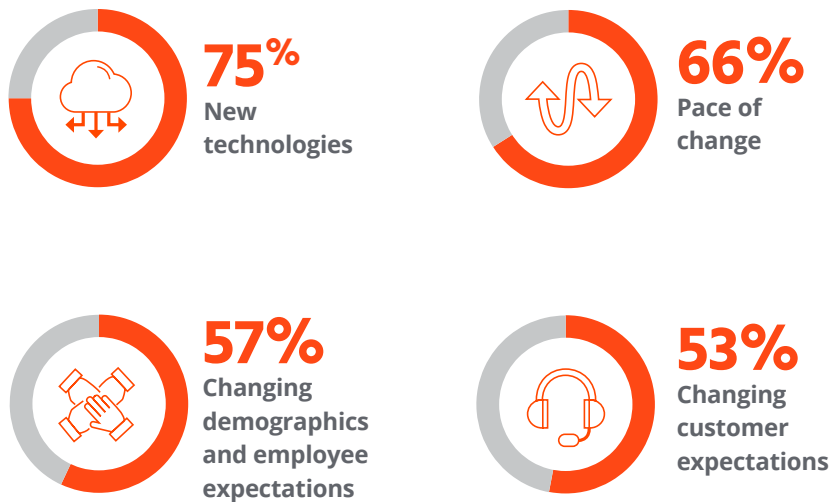
“ Things need to be handled in a reasonable amount of time,” says Ebony Brumfield, Employment Practices and Compliance Manager at W. W. Grainger. “Ultimately, if I’m not able to get key information over to the people who need it in a timely manner in order to make a hiring decision, that affects my brand. Candidates may become impatient if things take too long, and that can leave them with a negative impression about our company.”

Read how Sterling helped Brumfield and her team cover this gap in this [customer story](#).

Source: ¹ Deloitte’s 2019 Global Human Capital Trends report

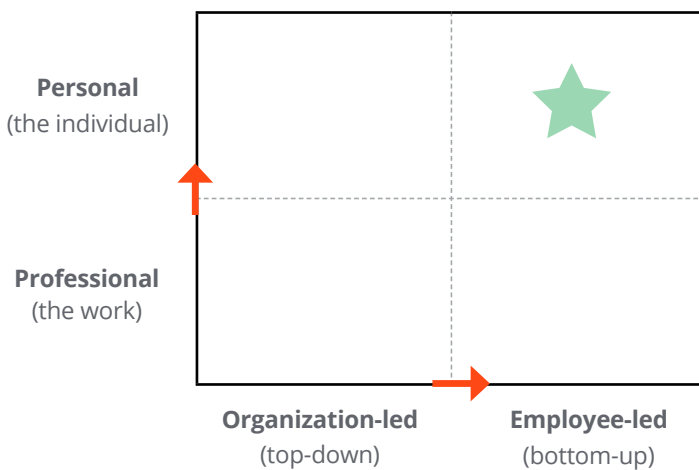
The 21st century creates a new context for leadership

In a recent poll, Deloitte asked respondents the following question: Why do you think there is a difference in the unique requirements for 21st-century leaders?*



Experience should be both bottom-up and personal

Consequently, experience should be both bottom-up and focused on the individual.



*Only respondents who believed that 21st-century had new and unique requirements answered this question. Source: Deloitte Global Human Capital Trends survey, 2019.

The Empowered HR Department

Strategic onboarding starts with a fully empowered HR department.

The Human Resource team partners with its internal client groups to understand the needs of new hires and develop a process that will help the organization attract, onboard, and retain the best talent. An effective process is:

- Within appropriate time frames
- Within budget
- Aligned to strategic business initiatives

Any business that wants to operate at its greatest potential needs an HR department that functions at a high level. This involves providing HR the tools and resources to bring in and retain the best talent. By incorporating technology and automation when possible, you will allow your HR teams to focus on developing relationships with new employees joining the business as opposed to checking identity documents, completing new hire paperwork, or filling out forms such as the I-9 Form.

How does an empowered HR department handle onboarding?

Instead of wrangling new hire paperwork, top-performing talent acquisition and HR teams focus on doing what they do best: finding, recruiting, and securing the best talent for the organization. And then they devote time to creating dynamic and engaging onboarding programs.



The result? New hires will remember a transformative experience that immediately immerses them in the company culture, and they are far more likely to stay.



Onboarding Best Practices



Centralize the process

Whether it's HR or the hiring department, assign one resource to oversee onboarding.



Align onboarding goals to business goals

Give the new employee a turn at the bat by providing some meaningful work on day one.



Automate forms management

Don't burden new employees with paperwork on day one. Send all benefit information in advance, electronically, and securely.



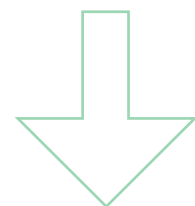
Articulate the new hire's potential impact

Outline your organization's big goals and explain how your rookie employee fits in to the big picture. Describe their potential impact on the company.

Create a 30/60/90-Day Plan

The 30/60/90-day plan is a transparent roadmap for the new hire to let them know where they are expected to go within their first 90 days. The plan should have specific goals, dates, and defined colleagues to work with in order to accomplish these objectives. Having a plan will help new hires enjoy a smoother transition to using company tools, understanding company processes, and understanding performance expectations. Breaking down a new hire's learning process into 30-day increments allows the employees to focus on learning certain skills

at certain times. The first 30 days are often the most intensive, with training on product and company tools as well as learning company culture. As the 90 days progress, the new employee's processes become more fluid and independent.



Your 30/60/90-Day Plan



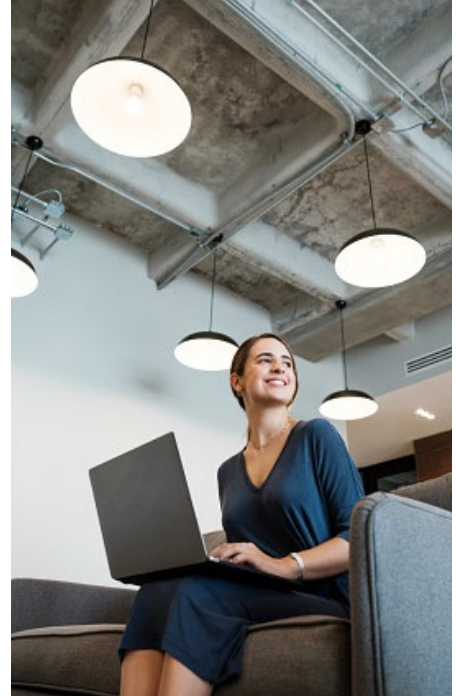
30 Days

- Hold weekly one-on-ones
- Share organization chart
- Have one-on-ones with team members to discuss their roles
- Learn company-specific platforms and intranet systems
- Attend team meetings
- Project ownership
- Company specific training classes
- Product or accounts knowledge
- Set goals/metrics/KPIs
- Get to know the company culture
- Build a career development plan



60 Days

- Collaborate with other teams
- Training continues
- Break down the steps of projects into phases – research, plan, and execute
- Identify issues or pain points with the roles – develop plans to address and fix the issues
- Start “contributing to the conversation” more often
- Weekly one-on-ones with manager
- Set up meeting schedules with teams/manager going forward
- Get feedback from manager on progress



90 Days

- Weekly one-on-ones with manager
- Work independently
- Become more accountable for their work
- Be proactive and become more involved in the company
- Continue execution of projects
- Plan for future projects
- Continual training
- Touch base with manager for feedback about goals/metrics/KPIs going forward



Onboarding with the Best

The statistics¹ below show that only some companies are getting it right with their current processes.



Increased Brand Awareness: 40% of candidates are looking for additional information about company culture before applying, so many employers are focusing on increasing their brand awareness across career sites, social media, and review sites.



Faster and Easier Means of Communication: In an effort to communicate earlier with potential candidates, 2019 saw a 100% increase in chatbot utilization across career sites. Similarly, the implementation of mobile text-message campaigns increased by 56%.



Interview Preparation and Feedback: 32% of candidates in North America receive little to no detail about how to prepare for interviews. However, when candidates do receive details and feedback after interviews, they are 164% more likely to increase their relationship with an employer.

Similarly, overall resentment from candidates decreases by about 30% when candidates are given specific feedback throughout the process. Nearly 60% of candidates currently receive rejections from a “do-not-reply” email address, so a more personalized approach to feedback can make a large impact.



7 Onboarding Mistakes to Avoid

Sidestep these common pitfalls of the onboarding process to create an engaging, positive first day for your new hire.

DON'T:

- Leave the new employee in a conference room to fill out forms
- Schedule the first day when the new hire’s manager is absent
- Fail to provide basic tools of the job: workspace and computer passwords
- Drop a welcome packet on the new hire’s desk and call that the onboarding process
- Equate an orientation session with onboarding
- Leave the new hires to navigate the office for themselves
- Assume that no news is good news

Source: ¹ 2019 Talent Board North American Candidate Experience Research Report

10 Organizations that are Getting it Right

Take your cue from companies¹ that have empowered their HR departments to do more than push paper on an employee's first day. They show how onboarding can showcase company culture and build loyalty from the start.

CSAA Insurance Group

The Insurance carrier is continually analyzing data gathered by surveys at every stage of the hiring process and throughout the candidate journey. This allows them to understand the impact that their onboarding process has on their brand and areas in the process that could use improvement.

Based on their findings, the organization has created an environment that highlights and reinforces the priorities of their talent acquisition team. CSAA has invested in new technology and resources to aid in the development of a repeatable, standard process. The recruiting team is able to more efficiently and effectively ensure a consistent, positive journey for every applicant.

Dr. Reddy's Laboratories, Inc.

Dr. Reddy's Laboratories, Inc. is a multi-national pharmaceutical company that became more prevalent in the U.S. and needed a recruiting process that would help them find their ideal candidates and continue to build their brand. Today they focus on providing transparency to candidates about their process. Direct, personalized and friendly candidate communications are paired with fast response times to ensure that the recruiting team is addressing all candidate needs.

Stantec

This design and consulting professional service company with an international footprint set in motion a transformation plan to improve the candidate experience in 2017. The talent acquisition team recognizes the importance of hiring and retaining top talent while making them more aware about the importance of candidate feedback. Some of the tools they implemented included conducting conducted pulse surveys, looking at hiring trends, and monitoring company review platforms. Using analytics the company drew deeper insights into the impact of talent acquisition on business

Syneos Health

A Nasdaq-listed multinational contract research organization, focused on engaging, providing details, and guiding prospective candidates for a better experience using microsites developed specifically for their career pages. This also helped the organization attract better quality candidates.

The impetus to create microsites lay in the goal to create a seamless applicant experience with greater functionality and easy site navigation. These sites also afforded the added advantage of personalized outreach and an answer the primary question most candidates have – why they should work for Syneos Health.

To ensure business sense in tandem with the hiring process, both the recruiting teams and the business teams provided key input on creating and developing the microsites. These team approach to enhancing candidate experience helped them attract the right talent.

HOAG Memorial Hospital Presbyterian

This not-for-profit regional health care delivery network developed a standardized candidate process with a no-fluff internal workflow. This candidate experience is the same across all departments, as the company has invested in new technology that has resulted in an 20% increase in productivity.

In addition, HOAG Memorial releases a biweekly newsletter, which features content for job seekers. The team is able to highlight their own candidate journey and call out resources that can help job seekers on any career hunt.

Source: ¹ 2019 Talent Board North American Candidate Experience Research Report



Kronos Inc

Kronos merged with Ultimate and they are now UKG.

Kronos, Inc. offers workforce management software and services to their customers, understanding the importance of maintaining the Kronos Family. The company developed a high-touch candidate process, "Candidate to Kronite" (C2K), in 2018. This journey seeks to clearly define priorities and the candidate life-cycle from initial contact to 6-months of employment.

Candidates become heavily engaged early on in the recruiting process with articles and other resources. This continues throughout the cycle, building further interest, inspiration and excitement about being part of the team. Since job seekers have been particularly responsive about how valued they feel as a Kronos candidate, the team has sought to build further support internally among current employees as the program evolves. This includes offering additional education and tools about interviewing, recruiting and management.

PointClickCare

The PointClickCare helps others navigate the evolving realities of value-based care. In addressing changing candidate demands, the business wanted to specifically focus on providing candidates with regular feedback throughout the process. In addition to installing new technology for recruitment, including a new ATS, they set up status notifications for all candidates. This provides transparency to candidates about their current position in the candidate pipeline. Internally, it also creates efficiency by showing recruiters where candidates might be disengaged.

The team is also ensuring consistency and support by having every employee involved in the interview process go through their "Hire to Win" training program. In addition to teaching individuals how to create a fantastic candidate experience, it also outlines how that experience can directly impact the employer brand.

Proctor & Gamble

With a digital-first, candidate driven market to address, this global consumer goods corporation created a mobile-friendly application process 100% online. They also incorporated a chatbot, which has seen increasing engagement from applicants. At the end of every assessment they have included an NPS survey, which allows them to capture candidate feedback across regions, job segmentation and more to further improve the candidate journey.

Walgreens

The Walgreens team recognized that they needed to cater to job seeker demands to combat turnover and low candidate application activity. In addition to simplifying their application process, they actively sought to minimize the response time between steps of the onboarding process. Today, all hiring leaders are required to provide feedback within 48 hours at each touchpoint.

In an effort to identify additional areas for improvement and addressing candidate needs, Walgreens has set up chat bots and monthly surveys to help candidates. Throughout the onboarding journey, the team also seeks to familiarize candidates with their culture, team and innovations by sharing videos and team-specific content.

Waste Management

Waste Management has made adjustments internally to further build out essential recruiting teams so that they can be more responsive to their candidates. The process begins with a 5-minute application, significantly shorter than the 45-minute questionnaire they previously required.

In addition, Waste Management has implemented a streamlined approach to the interview process through automated video and recording interviews. Candidates have more flexibility and face minimal scheduling conflicts that can slow down the onboarding process. With a larger dedicated team and support from the rest of the business, they can provide fast-follow feedback and cut down the amount of time needed for each step in the onboarding process.



Day One and Beyond Checklist

A new hire's first day can be hectic for everyone. Avoid last-minute mix-ups and set the stage for success with this to-do list.

- Create a warm welcome
- Specify a start time for day one
- Assign someone to greet the new hire
- Offer a small welcome gift
- Confirm that the new hire's manager is in the office and available to meet with them

Provide the tools the new employee needs to become productive

- Fully equipped workspace: tools and equipment for at-workplace or at-home environments
- Voicemail setup instructions
- Network passwords
- Building/garage access codes or cards
- Instructions on how to resolve IT questions

Involve the entire team

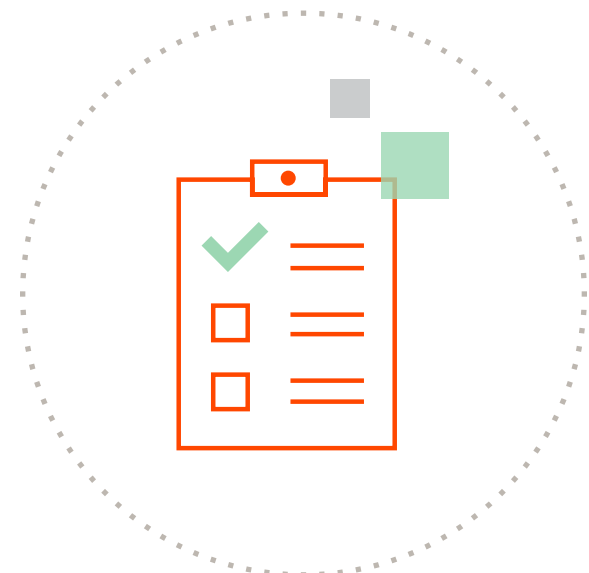
- Host a welcome lunch
- Organize one-on-one welcome meetings
- Plan an orientation and company overview
- Schedule time with key leaders to give insight into company goals
- Create a seamless transition from the recruiting process to the new job

Send benefits enrollment forms in advance – electronically and securely

- Set up automatic payroll deposit – also in advance
- Schedule an orientation to the company
- Arrange a meaningful task to complete on day one
- Connect the dots: Explain how the new hire's job relates to company mission
- Book regular touch points over the first six months of employment

Create 30/60/90 day plan

- Learn company specific platforms and intranet systems
- Schedule training sessions
- Have one-on-ones with manager
- Set goals/metrics/KPIs
- Project ownership





Technology with a Human Touch

Onboarding is a people-oriented process that demands time and energy. Technology can help facilitate, but not replace it.

By moving new-hire paperwork and the initial socialization process to a unified online system, you can improve the experience for HR and new employees alike.

Your rookie employees can skip the day-one paperwork and complete all new hire forms electronically and securely, as well as complete an identity verification process – before they ever set foot in the office or on the jobsite. Your HR recruiters are now free to do what they do best: interact with new employees on a person-to-person level.

Powering Business by Investing in HR Tech

According to the 2019 American Candidate Experience Research Report, the investment of time and efforts into the onboarding systems continue to be a major area of focus for companies. 79% of employers already have one in place and it will remain a top 10 technology investment for 2020. According to KPMG’s The future of HR 2019: In the Know or in the No Report¹, about two-thirds of HR executives believe that HR has undergone or is undergoing a digital transformation. The report also found that among companies that have invested in artificial intelligence (AI) to date, the majority (88%)



The number of employers interested in investing in chatbot technology in 2020 increased by 100%.

deem the investment to be worthwhile. Attracting the right candidates is getting more and more attention because of the evolution of the job market. To stay competitive, employers need to attract and source the right candidates, which involves creating an onboarding process that caters to those specific candidate’s needs, especially through a technology-first, user friendly journey. This starts upfront with incorporating identity verification in the pre-onboarding phase. Demonstrate to candidates they are engaged with a forward-thinking, modern company. The number of employers interested in investing in chatbot technology in 2020 increased by 100%. 2020 also marks a high interest from employers to include video job descriptions.

Source : ¹ <https://assets.kpmg/content/dam/kpmg/xx/pdf/2018/11/future-of-hr-survey.pdf>

““ Candidate expectations are being shaped by their consumer experiences with brands like Google and Amazon. Candidates expect to easily find the information they are searching for, research peer reviews, and experience a process that is quick and convenient.”

–Jobvite

““ As more candidates express a desire to learn about and apply for jobs from their mobile devices, we have worked with employers to optimize their online application process. In order to attract the best candidates, it is essential to offer candidates what they want – not only for the job (compensation, benefits, or opportunities for professional development), but also for the hiring journey.”

–ManpowerGroup Solutions

Top 9 Tips for the HR Software Buyer

The time and money you spend on choosing a new software solution can be a daunting proposition. But, with a little preparation, it can be painless. You'll see tremendous opportunities to increase ROI after you've implemented a system that fits your needs and makes your entire department run more efficiently.

1 Assess Your Landscape from Candidate Experience to Compliance

You can't get where you want to go if you don't know where you've been. Take a hard look at your current technology solutions. Identify bottlenecks and critical steps that make or break your efficiency. For hiring, look at your entire process and go through it from the perspective of a candidate.

- What is the experience that you want candidates to have? What will drive engagement early in the process?
- What sets you apart from other employers, and how do you address the diverse needs of the different generations, specifically Millennials?
- What do you want your ideal software solution to accomplish?
- How broad and far-reaching does your software solution need to be in its capabilities?
- What is the true cost to recruit, hire, and train one candidate?
- Is your current background screening solution consistently updated to enable compliance with local, state, and federal laws?
- Does your current onboarding solution allow for electronic state tax and Form I-9?
- Will your current onboarding solution offer validation, auditing, and storage of onboarding documents?

2 Involve the Stakeholder

Don't make these decisions in a vacuum. Think about others who use your current systems or



would be affected by a new software purchase. The list is often longer than you think, as you'll need to involve all your HR end users, your IT folks, payroll specialists, and anyone whose responsibility touches this process, or whose job will be impacted by change. Executive buy-in is also critical. Consider suggestions for “must have” features in the final product. An ROI calculator can help make your case.

3 Research the Players

This task can be so daunting that organizations sometimes hire industry consultants who act as “matchmakers” for technology providers. But there’s no need to be overwhelmed. Do some research and get some recommendations.

LinkedIn groups and professional associations are great places to ask unbiased HR professionals what is working and what is not. Cull your options to a short list of possibilities.

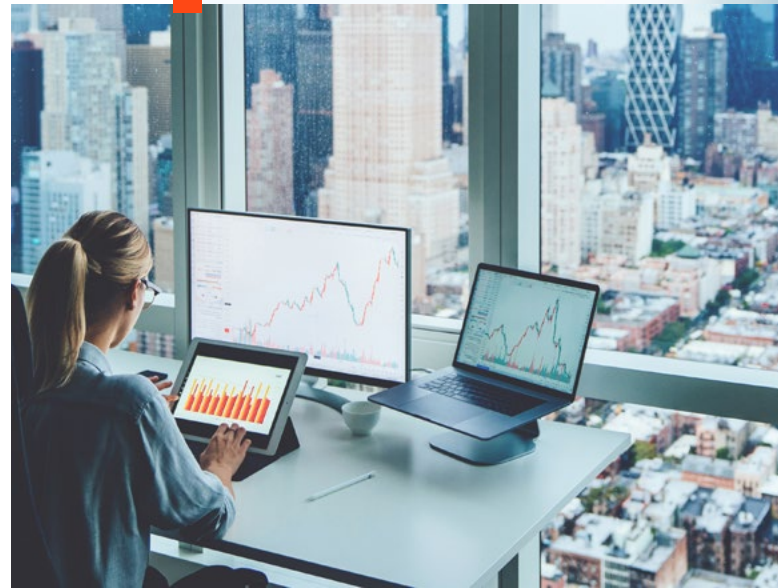
But don’t just go for tried and true – look for innovators. An organization that hasn’t altered its offerings in five years might not be adjusting to the changing landscape.

4 Take a Test Drive

Get a demo of the product and ask tough questions. View the solution from every stakeholder’s perspective, including your employees. Ask what future releases will include. This question will reveal the features that aren’t yet available. If these items are mission-critical, you might not want to wait. Ask to “drive” the product yourself, rather than having a salesperson do it.

5 Consider Your Other Systems

Integration can mean lots of things to different people. Make sure you understand the capabilities of the integration. If a custom integration is required, be sure that all software solutions are open to such integration, that it has been completely scoped out and the complete costs identified and quantified. Optimally, look for certified partnerships between vendors that will ensure a seamless integration.



6 Consider the Human Element
 There's more to a technology purchase than the software and hardware. You need to feel comfortable with the human team that stands behind them. Your sales rep is a window into the company and its operations. Be sure you are entering into a partnership and not just a relationship with another vendor. When you have questions or need guidance, is there a team to help you? Who will offer training to end users? The relationship with the provider will be there for a long time. Make sure it's with people you like working with.

7 Sign on the Dotted Line
 Congratulations. You've selected the perfect HR technology solution for your needs. Rejoice!

8 Bring the Team Onboard
 Now it's your turn to educate your internal users on implementation and training. A little planning will save time in the long run. You've chosen a partner that gives great support, so don't be afraid to ask for it. Make sure everyone knows the objectives of the tech purchase so that any feedback or questions will be measured against them. Keep communication flowing freely during deployment and training to maximize efficiency.

9 Measure Results and Report Findings
 Enjoy your new system while continually evaluating it. Measure your results to make sure your investment was worthwhile. Regularly communicate with your account manager or sales contact about best practices and software updates. Send feedback on future improvements or features that you'd like to see. Your new partner should be collecting data on the back end and sharing it with you. Make sure you're using it to your advantage. Take your analysis and present it to your executive team.

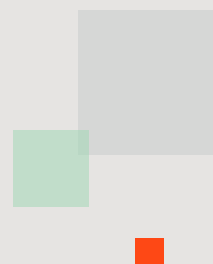


Measuring Success

Before you invest in creating or updating an onboarding system, it's important to know what impact you intend to make. An automated system can save HR many hours of wrangling paperwork, but there are other key performance indicators to track.

These are the most common metrics that measure the success of an onboarding program:

- Number of errors (or fraud) prevented with upfront identity verification
- Length of time from offer letter to start
- Time required to process hiring paperwork
- Error rates on hiring forms such as Form I-9
- Retention rates
- Recruiting and hiring costs
- Employee engagement





Onboarding with Sterling

Sterling onboarding services streamline and automate all the critical and time-sensitive tasks associated with bringing a new hire into your organization while providing a great experience for all involved. We recognize that each organization has unique needs with distinct processes. That's why we offer a variety of flexible, customizable workflows designed to streamline your end-to-end hiring process. Configurable workflows that map to your hiring needs can help you eliminate paper and reduce time in your onboarding process. Our cloud-based software delivers the most up-to-date forms and Sterling experts help you navigate compliance complexities. You can breathe easier and have the confidence that government-mandated and corporate new hire forms are being completed accurately, while preparing your new hires for a productive day one.

Company Branded Candidate Portal

- Secure, online portal with anytime, anywhere, any device access
- New hires complete hiring tasks like completing and signing government and corporate forms
- Simple, self-service tools to manage branding and content within the portal, including policy documents, social media and video

Built-in compliance tools, dynamic validation, customized experience

These are just a few ways we can help you reduce your hiring risk by delivering the right forms and guiding new hires through to complete them correctly.

eForms Library for Streamlined Onboarding

- eOffer letters – customizable templates
- Government forms including electronic Form I-9 and E-Verify, W4/W9, over 120 State tax withholding forms and equal employment opportunity
- Corporate forms – standard and custom – including direct deposit and emergency contact
- Supplemental hiring documents like your company's unique health, dental, life, disability, 401k enrollment, corporate policies, etc.

Key Benefits

- A professional and engaging onboarding experience that can impact brand equity
- Configured hiring workflows to map to your unique needs for positions across the organization
- Increased efficiency in your hiring process by pushing candidate data through screening and onboarding tasks
- Confidence that your onboarding process is consistent, aligned to corporate goals and encourages compliance



About Us

Sterling—a leading provider of background and identity services—offers background, identity verification, and Covid-19 health testing services to help over 40,000 clients create people-first cultures built on foundations of trust and safety. Sterling’s tech-enabled services help organizations across all industries create great environments for their workers, partners, and customers. With operations around the world, Sterling conducts more than 75 million background checks annually.

Want More?

In addition to this report, Sterling regularly publishes cutting-edge research and insight on the latest trends in human resources, talent management, and hire processing.

For more information, visit us at:
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Table of Contents →