ClearCo.

Optimize Onboarding: How to Find the Best Onboarding System

Onboarding's Ripple Effect on the Employee Lifecycle

How would your new hires rate their onboarding experience?

88% of employees report their companies are not providing a good onboarding experience. They're left feeling disconnected from the company and unprepared for their new roles. Even if your new hires stick around past onboarding, your company will likely experience disengagement, higher turnover, and inflated hiring costs.

But when done well, onboarding has clear benefits:

70% **70% of employees** who say they had a good onboarding experience would agree that they have the "best possible job."

54% Great onboarding can lead to a **54% increase in engagement**.

69% **69% of new hires** will stick with the company for at least three years if they had a good onboarding experience.

Since you're looking for a new onboarding system, you might be in the minority of companies whose employees say their onboarding experience was great. But if it's your first foray into the world of onboarding software, you may be part of the majority that could use a hand to improve their process.

So, how do you navigate the purchasing process, find the right onboarding system for your company, and implement your new software successfully?

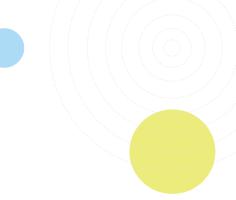**There are several steps to complete before your new onboarding software is up and running:**

- Get buy-in and budget from leadership
- Choose a handful of potential software providers
- Demo and vet your options
- Make a purchasing decision
- Implement the software
- Train your HR team
- Use the new software company-wide

The ClearCompany Onboarding System Buyer's Guide is here to help with that.

If you're looking for the right onboarding solution, start here for insight and advice on critical features, questions to ask about your onboarding needs, how to assess vendors, and more.

50% Formal onboarding programs can lead to **50% higher retention and 62% greater** productivity among new hires.

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Why is an Onboarding System Important?

Catch and Keep Your Top Talent

You spend weeks or months finding and hiring new employees, and then it's often a few more weeks before their first day. That's followed by weeks of training and getting them acclimated to the role and work environment. Even after all that, new hires are *still* more likely to quit during the first year.

So, how can you beat the trend and hang onto these valuable new employees far beyond that? A structured onboarding process is the answer.

Onboarding is the foundation of the employee experience.

Employees with a good onboarding experience are three times more likely to feel supported and prepared to do their job. They stay longer, feel more connected to their company's goals, and are motivated to do their best work. Onboarding gives new hires the tools they need to do their job well and shows them how their work fits into the big picture.

SCS Global Services implemented a six-month check-in to gain insight into new hires' progress when they started using ClearCompany.

With the right onboarding system, you'll have access to all the features your HR team needs to develop well-prepared employees who stick around. You'll be able to:

- ✓ Design new hire experiences unique to every role

- ✓ Kick off onboarding tasks before day one

- ✓ Empower HR and new hires with structured onboarding processes

- ✓ Understand roadblocks in onboarding and correct them

- ✓ Build new hires' confidence with transparency, clear expectations, and frequent feedback

- ✓ Access in-depth onboarding insights from your people data

Use our Onboarding Buyer's Guide to understand your company's onboarding needs, research potential solutions, and make an informed decision for your HR team.

What Problems Does an Onboarding System Solve?

Eliminate Confusion and Enhance Clarity

Onboarding is about much more than the administrative side of hiring new employees. Yes, there's paperwork to sign, payroll information to collect, and benefits to enroll in — and an onboarding system certainly helps with those tasks.

More importantly, onboarding is when new employees truly decide if their new role and your company are right for them. Does your onboarding experience act as an extension of a great candidate experience? Do role responsibilities and the work environment align with new hires' expectations? Do HR teams and hiring managers have what they need to support new hires as they adjust to their new jobs?

If not, new hires might feel misled, which does not elicit good feelings toward their new job or your company. Without a process to refer to, your HR team will likely feel unprepared and easily overwhelmed, which can cause frustration, mistakes, and incomplete onboarding. It's easy to see how poor onboarding can leave both new and HR employees feeling unsupported.

Fortunately, software can solve many of HR's common onboarding problems:

- Time-consuming manual processes
- Disorganized or inaccurate new hire information
- Lack of structure and standardization
- Unengaging new employee experience
- Lack of transparency around onboarding processes
- Bottlenecks due to silos and miscommunication
- Lack of insight into the effectiveness of onboarding strategies

An onboarding solution is also beneficial for eliminating pervasive issues for new employees:

- Paper-based processes for submitting their information
- Infrequent communication from the company after hiring and before their start date
- Lack of connection with company culture and new colleagues
- Confusion about job responsibilities
- Irrelevant or incomplete training
- Lack of understanding of company policies and procedures
- Onboarding programs that are too long or too short
- Lack of feedback on their first assignments or projects

> "
>
> The onboarding piece has streamlined our process and has allowed us to bypass the typical boring first day of paperwork by sending it electronically to new hires prior to their first day of employment.
>
> **All in all, ClearCompany has saved our organization a lot of time and money with their ATS and Onboarding software.**
>
> **Trevor A.,**
> Director of Human Resources
> Enterprise (> 1000 emp.)

Making a Case for Onboarding Software

New Employee Empowerment and HR Efficiency

Over the past few years, most HR teams have dealt with nearly every extreme of the labor market. You've endured challenges from record unemployment and layoffs to historic resignation rates and unprecedented competition for candidates. Solid foundations are what enable HR teams and new employees to weather these uncertainties — and you can't build those on paper.

Today, strong processes are built on technology. An onboarding system can be the foundation for both HR teams as they create or improve new hire processes and for those hard-won new hires at the start of their employee experience. Embracing technology-powered strategies also means giving your HR team the tools they need to play a part in their company's strategic growth.

To make a solid case for an onboarding system, identify the key stakeholders who will approve the budget and make the final purchasing decision.

Then, determine which of these reasons your company needs onboarding software they find most compelling:

- A need for modern solutions in a competitive labor market

- Scarcity of great onboarding experiences, according to employees

- Demand for a top-notch employee experience

- Benefits of standardized onboarding programs

- Updating obsolete processes

- Hours of valuable time savings for HR

- No more mistakes due to human error

- Nurture engagement during a critical stage of the employee lifecycle

- Improve productivity and performance for new hires immediately and long-term

- Build camaraderie among new hires and colleagues

- Access in-depth insights from onboarding processes

- Persistent unpredictability in the labor market

Two in five HR professionals spend **at least three hours** collecting employee information for onboarding.

Take these steps to get buy-in from leaders and stakeholders:

1. List each stakeholder's name, title, department, role in the decision-making process, and specific onboarding challenges.

2. Identify the issues each stakeholder needs the new system to solve.

3. Determine need-to-have vs. nice-to-have onboarding software features and ensure everyone agrees to make the final decision easier.

4. Outline the business case for the new onboarding system.

You'll need to clearly show the problems with your current onboarding system or process and how software can help solve them. Make sure to include metrics to illustrate your points.

You can use HR metrics like these to support your case:

1. HR hours spent on manual onboarding tasks.

2. Your current new hire retention rates and onboarding satisfaction scores.

3. Analyst findings or reports on companies that use onboarding software from firms like Gartner.

4. Testimonials showing the positive impact of an onboarding system from review sites such as G2 and Software Advice.

The Impact of Employee Onboarding

2.6x
Employees are 2.6 times more likely to be "extremely satisfied" with their companies after an exceptional onboarding experience.[1]

78%
78% of companies that invested in their onboarding strategies saw an increase in revenue, and 54% saw increases in their engagement metrics.[2]

33%
33% of employees say they would leave their jobs after a bad onboarding experience.[3]

Sources:
1 www.gallup.com/workplace/353096/practical-tips-leaders-better-onboarding-process.aspx
2 www.zippia.com/advice/onboarding-statistics/
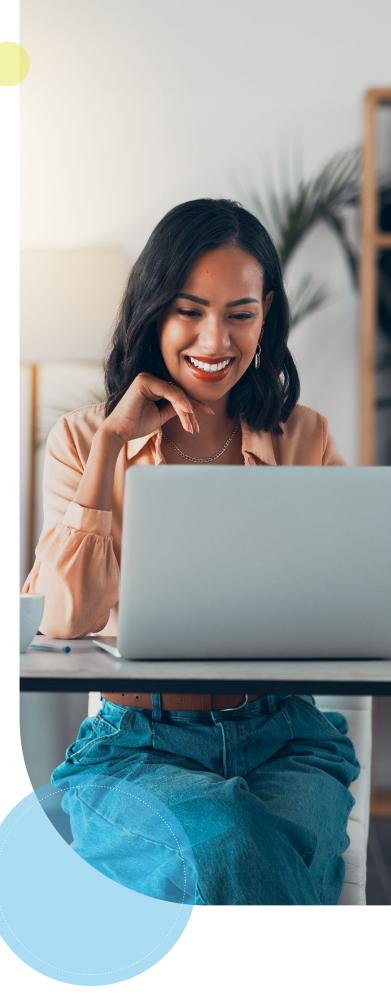*3 www.businessnewsdaily.com/9936-consequences-poor-onboarding.html*

12 Features Your Onboarding System Needs

Engage New Hires and Build the Ideal Onboarding Experience

An integrated, streamlined set of features is what defines an outstanding onboarding system. We're not just talking about bells and whistles or fun features that aren't actually useful. Your onboarding software needs some core functionalities that will help you get your new hires into your systems, engaged, and ready to hit the ground running.

Look for an onboarding system with these 12 top-notch features. You'll have the tools you need to lay the foundation for an onboarding experience that not only ticks all the boxes but goes the extra mile in fostering employee satisfaction, reducing turnover, ensuring compliance, and boosting your workforce's productivity.

Don't miss a single step in the onboarding process — download ClearCompany's New Hire Onboarding Checklist.

1 Intuitive User Experience

Great onboarding software is intuitive and easy to use for new hires, HR teams, and other employees involved in the onboarding process. Good user experience enables new hires to access resources and complete tasks easily. It also allows your internal team to manage all the administrative tasks and compliance behind the scenes from one centralized, user-friendly system. That way, everything is ready for your new employee's arrival on day one.

2 New Hire Self-Service Portals

Empower new hires to start their onboarding journey independently and take some of the burden off of HR with an employee self-service portal. Give new hires the reins in their onboarding experience, putting relevant onboarding information at their fingertips for a more engaging process.

3 Automated Workflows

Save HR time by automating task notifications, welcome packet creation, and more. Automated workflows help streamline the onboarding process, reducing manual tasks for the HR team and ensuring that each step of the onboarding journey occurs on time.

4 Digital Forms with Autofill

Paperwork is necessary, but it doesn't have to be a pain. Digital forms with autofill capabilities simplify necessary paperwork and make filling out forms a breeze, reducing errors and saving time for both HR teams and new hires.

5 Built-In Background Checks

Cross vital onboarding tasks off your list in no time with I-9 form processing and E-Verify. Store documentation digitally to avoid compliance headaches.

6 Compliance Tools

Automatically complete background checks without re-entering candidate information. You can be confident you're bringing the right people on board and eliminating a common manual data entry task for HR.

7 Device & Equipment Management

The best onboarding systems make it easy to assign and track company-owned devices. It's your inventory assistant, ensuring all your new hires have the gear they need to get to work.

8 Onboarding Checklists With Centralized Progress Tracker

Build a complete new hire onboarding checklist to ensure your newest employees and your internal team complete every step in the process. Checklists and task trackers enable HR to keep track of each new hire's progress and ensure your company consistently provides the best possible onboarding experience.

69% — **69% of employees** who had a good onboarding experience will stay at the company for three years or more.

9 Payroll and HRIS Integrations

Say goodbye to data entry errors and hello to seamless data transfer between your onboarding system, payroll, and HRIS.

10 Employee Surveys

Gather feedback on your onboarding program from new hires as soon as they complete it. Tap into their insight so you can strengthen your company's onboarding experience.

11 Culture Highlights and New Hire Goals

Give new employees a sense of purpose and belonging right from the beginning with a personalized onboarding experience. Onboarding software with culture highlights and new hire goals helps them learn about the company culture, meet their team members, and get familiar with how their roles and goals align with your company's mission.

12 Onboarding Analytics

Get real-time analytics into how your onboarding process is shaping up so your team can effectively identify areas for improvement and fine-tune the experience.

Key Considerations Before You Buy

40 Questions to Ask to Find the Best Onboarding System

There are many factors to consider before investing in a new onboarding solution. Ask the right questions so you can focus on what's important and find the best system for your organization.

We've compiled a list of 40 questions to help you choose the right onboarding system.

Some of these questions are for you to answer with your team testing onboarding solutions, and some are for you to ask vendors during hands-on demos.

CLIENT REVIEWS REPORT

Every outstanding onboarding experience starts with a captivating candidate experience. ClearCompany helps clients do both.

Get the Reviews Report

Employee Onboarding Database

Your onboarding system will handle essential onboarding data, including sensitive employee information. You need to know where the data is hosted and how to access it.

Ask the following questions during your demo:

1. What is the system hosted on, and is the data file fast, reliable, and scalable?

2. How is data exported?

3. Can it integrate with other systems?

4. What security measures does the system provide to protect new hire data?

5. Can role-based access be provided?

Software Flexibility

How do you determine if a vendor can accommodate your company's unique onboarding process? Before the demo, share the challenges your team is facing and ask vendors to personalize their walkthrough to your needs.

Ask the following questions during your demo:

6. Can I set up onboarding processes specific to roles or types of employees?

7. Is the onboarding process completely paperless with this system?

8. Can you walk me through a typical onboarding process both as a new hire and as an HR employee?

9. What parts of the software are accessible to new hires' managers?

10. Does the system allow electronic document completion?

11. Which onboarding workflows can I automate with this system?

Integration

You'll need to share new hire data with managers and different software platforms, like your payroll system. Look for an onboarding solution that seamlessly integrates and makes it easy to share information.

Answer these questions before your demo so you can ensure the software will meet your needs:

12. What onboarding and new hire information needs to be shared with our other systems?

13. Who needs to be able to access onboarding data?

14. Will any third parties need to have access to onboarding data?

User Experience

The onboarding system you invest in should have an easy-to-use interface and intuitive user experience. Make sure to consider both your most and least tech-savvy employees.

Ask the following questions:

15. Who will use the system, and how much time will they spend using it?

16. What is the technology experience level of the average user?

17. How does this system accommodate those who aren't as tech-savvy?

18. How much time can the business allocate for onboarding and training on the new system?

19. How long does it usually take for users to become proficient at using the onboarding system?

Training & Support

Up-front training for the new onboarding system is necessary, but you should also consider ongoing training for new hires and after new features are released. Can your teams manage training internally, or does the software provider offer training sessions as needed?

Ask the following questions:

20 Do you have the budget, bandwidth, and resources to manage training internally, or do you need the system to provide ongoing training?

21 What level of training is required for the various roles within your organization?

22 Does the system provide the level of granularity required?

Functionality

The system you choose must incorporate your need-to-have functions and should also have the ability to grow to meet the needs of your future workforce.

Ask the following questions:

23 Which features do we need in the system today?

24 Which nice-to-have features will be need-to-have in the future?

25 Will this system be able to provide for those needs?

Implementation

Deployment of the new software shouldn't disrupt your current system, whether you're moving from a manual process or another vendor. Ensure your new system can retain existing onboarding data so you don't lose valuable information.

Ask the following questions:

26 How can data be transferred and organized into the new system?

27 What do we need from the IT department to get the new software up and running and maintain it?

Cost

The typical pricing models for onboarding systems are pay-per-user and pay-per-employee. Costs may also include implementation or setup fees.

Ask the following questions:

28 Which pricing model best fits our budget and needs?

29 Which features are included in the monthly or annual price?

30 Which features incur extra costs?

31 What are typical payment terms?

Vendor

Don't be dazzled by a sleek system or a shiny user interface. You also need to evaluate the provider to ensure you choose a vendor that is invested in your success, not just an upsell.

Ask the following questions:

32 How long has the vendor been in business, and how many clients use their software?

33 What industries does the vendor typically serve?

34 What size are most of the businesses the vendor serves?

35 Are customer suggestions for software development often accepted or implemented?

36 What does a typical customer review say?

37 How does the vendor act on negative reviews?

38 Has the vendor received any awards?

39 How are their technical and customer support functions rated?

40 What does their customer support program look like?

11 Tips for Productive Onboarding Software Demos

Choose Your New Onboarding System With Confidence

With your lists of necessary and dream onboarding system features and questions for vendors, you're ready to determine which software solutions your team will explore. But with so many different types of software on the market, you need an organized, consistent process for evaluating your options.

In addition to online research, ask your extended network for recommendations and allow your HR team to assess any relationships with current technologies and offer their thoughts. Look for vendors who serve similarly-sized clients and have experience in your industry. Be sure to read customer reviews of onboarding systems on review sites like G2, Capterra, and SoftwareAdvice.

Gather a list of potential solutions and match your list of needs to their feature list or pricing page. Then, schedule demos to see the tool in action. Before taking your demo, create a checklist from the list of desired features and functionalities so you can easily keep track of the pros and cons of the software to refer to later.

Use these 11 tips for successful onboarding software demos:

1. Invite the final decision maker and at least one potential user to attend.

2. Have your list of feature expectations handy.

3. Take notes (preferably alongside your must-have list).

4. Give a clear idea of your company's needs and challenges for a relevant, personalized demo.

5. Be honest about the concerns you have with the tool.

6. Ask questions or repeat a step if you missed it.

7. Verify integrations with your other business-critical systems.

8. Ask detailed questions about support options and implementation.

9. Understand if there are any implementation fees.

10. If you don't hear a necessary feature mentioned, ask about it.

11. Get concrete costs and pricing information.

Above all, understand that software demos are yours to lead. The vendor is an expert on their product, but you are the expert on what your company needs in an onboarding system.

Start Your Search for the Right Onboarding System

The best onboarding software helps you create an engaging, retention-driving experience for employees and empowers HR with time-saving tools.

We hope this Onboarding Buyer's Guide helps you consider all key components of this critical purchasing decision so you can find the best solution

The Onboarding System Users Love

Be sure to include ClearCompany on your list of Onboarding System vendors to consider in your search. We'd love to see if our award-winning solutions fit your organization's talent needs.

"

We have realized many benefits of using ClearCompany. My favorite part is how seamless onboarding has become and getting the new hire all necessary paperwork signed before their first day!

Kitrina B.,
HR Generalist,
Mid-Market (51-1000 emp.)

[Get Your Personalized Demo]