

# Buyer's Guide:

How to choose the best onboarding solution





# Introduction

Onboarding employees is more important than many perceive. Your company spends the time and resources to find, attract and hire these people and getting them acclimated to your company and up to speed quickly, is in both their best interest and your own.

In fact, organizations with a **standard onboarding process** experience **54%** greater new hire productivity with **50%** better retention rates.

You understand that onboarding is important, but perhaps you've never evaluated or purchased a system to help with automation, compliance and quality of onboarding. Does it really need to be handled by software? Do you even know what you want the "perfect" process to look like for your organization?

This guide was built to help you:

- Assess your challenges
- Create a roadmap for onboarding success unique to your company
- Build a vetting rubric as you select software
- Determine the right software for your organization



A group of diverse office professionals in a modern workspace. A man in a blue shirt is gesturing while talking to a woman in a polka-dot top who is holding a tablet. An older man in a white shirt and tie is looking on, and a woman in a grey blazer is smiling in the background. There are shelves with binders labeled 'MAR-16', 'INVOICES', and 'Finance' in the foreground.

# Identify Your Onboarding Issues

Before getting started, hiring stakeholders (*sourcing team, recruitment team, core HR, hiring managers and any executives needed for purchasing*) need to come together and decide what you need in your onboarding process. We're not even talking about the software at this point, these are simply the onboarding needs for your company.

## Note:

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Many times a demo or sales call from a vendor can spark this conversation, but any information they send you should be just that, a spark. Do not force your process to conform to the software, instead map out your process and take those needs to market.



In order to facilitate the needs discussion, you'll want to identify pain points within your organization. Here are some common pain points in companies who have no or outdated onboarding processes and systems:

- New hires do not have important details or are unaware of forms they need to fill out
- New hires filled out I-9, W2 or other paperwork incorrectly
- New hires waiting to start training until paperwork is all correctly filled out
- Background checks aren't submitted before day 1
- No formal process leads to high attrition
- Lack of a centralized database with comprehensive employee information
- Missing information leads to compliance issues
- New employees take too long to reach productivity
- Lack of engagement or participation from both employees and managers in the onboarding process
- Missing important details (*passwords not working, uniform didn't arrive, etc.*)
- Lack of goals and guidelines to hit during onboarding
- Performance goals are not tied to training or onboarding new employees
- New hire retention is poor
- Managers are complaining about poor performance in new hires
- New employees are unable to access the onboarding system
- Onboarding takes too long
- High volume new hires have HR frustrated and overwhelmed because they can't keep up

# Solve for X

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Once you've assembled your team and identified your pain points and which members of the team those affect, you're ready to define the optimal solution.

For example, if you're searching for a solution because your HR team is overwhelmed with new hire paperwork and background checks, then you can simply list automation and organization of background checks and I-9s as a solution.







# Survey the Marketplace

There are many types of onboarding solutions available on the market, but not all onboarding solutions are created equal and many might have more functionality than you need, or less features than will be helpful (*see now why we created the list?*).

There are a few things you will want to determine before booking a demo with an onboarding solution provider. This information is typically covered in an initial call with a representative designed to determine if there is a mutual fit. Jumping straight into a product demo runs the risk of wasting your team's time, or falling in love with a software that can't solve your biggest challenge.

- How is the platform priced? Per user, per employee, per license? Is it an annual cost or a monthly cost?
- Will the system integrate well with your payroll software, applicant tracking system, or other critical HR softwares?
- How will the platform scale as your company grows?
- Do they offer the solutions to most of the problems on your list?
- How do they manage implementations? How much time should your team expect to spend implementing the product?



There are other considerations you should use to make your decision once you know a bit more about the solutions available.

## They include:

- Budget
- Location
- Language Support (*if necessary*)
- Specific compliance modules that may be necessary for your organization
- Service model
- Implementation fees
- Ramp time (*how long it will take your employees to start using the system as intended*)
- Ease of use (*look and feel*)

## What should I expect from my demo?

You as the buyer are in charge of the demo, don't hesitate to ask all of your questions. The product specialist or sales representative is there to walk you through how the product will work for you. They are going to use this time to find out exactly what you need out of the product and how their product will solve any issues that you have.

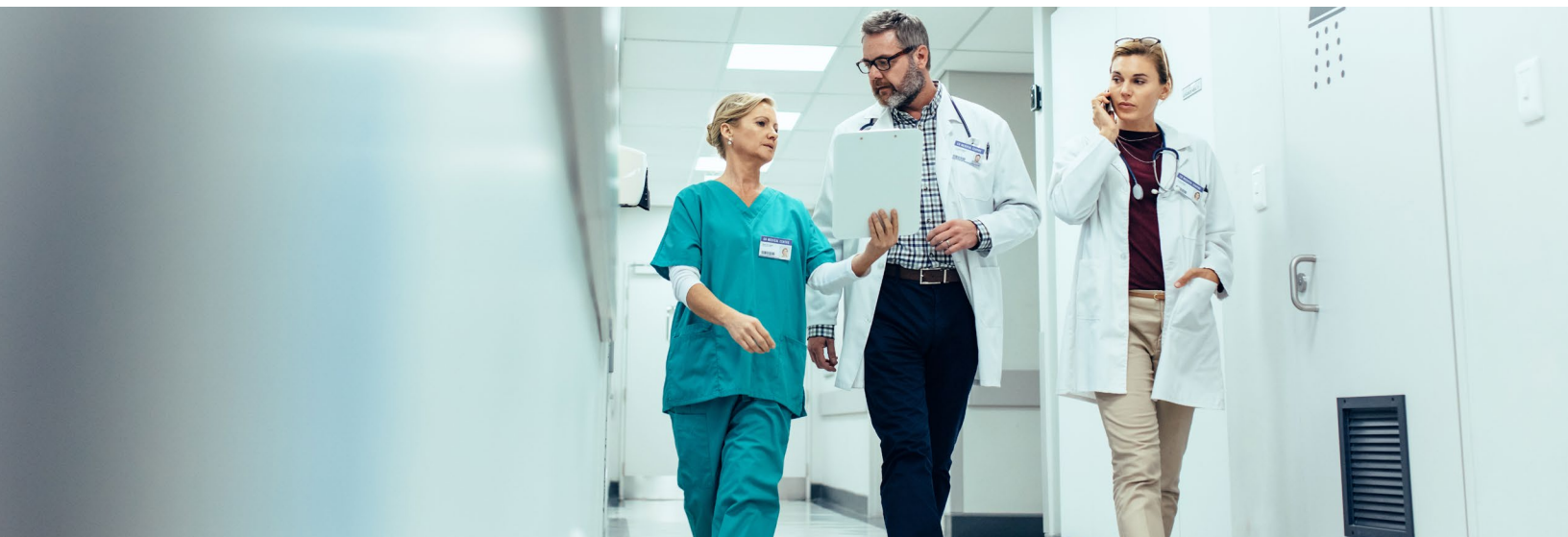


## ✓ Tip:

Mark down and take note of the must-have features your team is craving. What is most important to the success of your onboarding? To help in evaluation, rank these from most important to least and ensure that you are discussing and getting feedback from both managers and employees. However, note that the list above isn't the end-all, be-all. Take a moment to do your own research and see what other functions your company needs to make your onboarding a success.

## ✓ Here are some insights on how to be prepared for the demo:

- Write down your onboarding challenges, so you can ask how the software will benefit your processes. Ask any stakeholders or decision makers what they will need to understand the value in the product.
- Review your current solution to understand what gaps need to be filled (*if any*).
- Prepare detailed questions about features, support, and more.
- Before meeting with any vendors, determine a budget range you are comfortable discussing.
- Don't be afraid to share any concerns you have about a solution with the sales executive or product specialist. They are experts in the software.
- Be specific about training, support and implementation. Don't hesitate to ask for a sample implementation plan or to speak with someone on the customer success team.
- Also ask if you will have a dedicated account manager to help with any issues.





Budget, while not the only consideration, it's certainly important. Usually, you'll get customized pricing toward the end of your first run through of any given product. Make sure you don't leave the call without getting a ballpark of what the system will cost (*all-in*).

### ✓ Tip:

Before moving on, go through your current process and necessary improvements one more time. What will implementing this specific software look like and how might it impact budget, time and resources? Using this information, calculate what you can feasibly spend. It may help to make an itemized budget based on features that will be added or eliminated within this transition. Use the process list of your current strategies to evaluate what is needed for each department so you can adjust accordingly.



# Checklist:

Consider how far reaching your talent is and what that means for your application and hiring process. If you are an international company, the ability to host candidate applications in multiple languages might drastically help your candidate intake process.

- Easily Accessible New Hire Portal
- Mobile-Friendly Options
- Intelligent Forms
- I-9 Management
- E-Verify
- WOTC
- Background Checks
- Automated Workflows
- Tools for Benefits Administration
- Performance Review Scheduling
- Easy Reporting
- Payroll Partnerships & Integrations
- HRIS Integrations
- Internal Task Management

While this list may seem long, don't worry, our only consideration will not be features. But just like you need a specific number of items to properly make a recipe, you also need a list to find a software that's going to work for your company. As the list grows longer, divide it into 2 columns to indicate what is nice to have and what you must have.

For example, a centralized database is probably a must have for most companies, but the fact that Tom from accounting wants a payroll module built into the onboarding process may be more of a nice to have (*especially because most best-of-breed solutions have automatic payroll integrations so companies can continue to use their preferred provider*).



During your demo, make sure you have your list in front of you. If the company either has the solutions you've determined you need, OR it presents even better solutions to the issues you've identified, score it. You can use any scoring system you'd like, whether a letter grade, a numerical score, or a good-better-best scale. If you have other evaluators on the team, make sure you agree on a consistent scale and scoring system before the demonstration.

## Note:

Don't have time for everyone to stop their day for a demo (*or a handful of demos*)? Request the vendor record the demo or record it yourself. This way, every stakeholder in your organization can go through the features and questions at their own pace, saving you scheduling headaches.



### Mobile Accessibility

Let your new employees fill out essential paperwork quickly and from anywhere.



### Intelligent Forms

These forms automatically move information like name, address and social security number securely from one form to another, making the process fast and easy for all parties involved while ensuring accuracy.



### Tax Form Management

Stay up to date and compliant with important and essential tax forms such as I-9, E-Verify, WOTC and more.





## Automation

Define, automate and track your entire process with easy deadline setting and reminders for both new hires and your internal team.



## Background Checks

Keep your employees safe, your organization in compliance and your employee onboarding process free of bottlenecks.



## Performance Reviews

Use onboarding past the first few weeks! Automatically schedule and launch 30, 60, 90 day or any anniversary-based reviews you may need for employees.



## Reporting

Keep track of employees and visualize where your employee onboarding process works well, and where it needs work with an intuitive and visual dashboard that shows every piece of the process.



## Tools for Benefits Administration

An intuitive Benefits Administration solution allows you to easily setup and manage employee benefits, while making it simple for them to enroll.



## Payroll Integration

Don't sacrifice talent strategy for an administrative need. Transfer any information at any time to any payroll solution.

## Making the Choice

Take your list, feedback, research and start looking for the right fit! You may not find something that suits all of your needs, however look for software that has all of your must-haves. An important choice in choosing the right onboarding system also lies within what others have to say about the product. Ask your network for recommendations, look at some of the most well-known systems, and (*most importantly*) look at the product reviews. Looking at this feedback can give you a better glimpse into how the system will work for you.

### Things you need:

- ✓ Itemized list of current recruitment strategy and budget
- ✓ Average time and resources spent on your current processes
- ✓ Notes on what may change as you implement a new system

Looking for the best onboarding system for your company?

***Take a personalized demo of ClearCompany's onboarding solution!***





# Getting the Buy-in

You've done your research, asked around for feedback and ideas, have a clear understanding of what your onboarding system needs and have estimated how much you will be able to spend. And, thanks to all that, you've made the perfect decision for you team! But, before you can think about making the leap, you need to get buy-in from stakeholders.

When you've compiled all your deliverables and research into a solid document and presentation, it's time to make your case. You will need stakeholders approval before moving on. In order to accomplish this, you need to ensure that you are providing all of the information they need. Stakeholders are usually most concerned with the numbers. If you're able to prove the value saved, your chances of purchasing the software of your choice greatly increase.





## Here are some additional questions you should be prepared to answer:

- Why is an onboarding process and system beneficial?
- What will it cost and save in the long run?
- How will this simplify the process that is already in place?
- How does this help with employee retention?
- What are your average turnover rates?
- What features are you able to take advantage of?
- What does training and implementation look like?

### Tip:

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Keep all of your notes in one place and organized. Work to separate them into sections such as current processes, budget estimate, feature research and demo. This will help you know where everything is while putting together your document or presentation and also making it easy to answer any of the above questions. Then, during the meeting, take additional notes on other questions or concerns that come up, so you can get them answered with the vendor's product specialist or salesperson.



# Congratulations

The time has come, you've done all of the research you need and were able to get buy-in from stakeholders and higher executives. Make sure to keep leaders updated during the process and remember to take their insight into consideration. By providing the deliverables you've been collecting, you can now work with other managers to move onto the final step in the buying process - acquiring the system!

Now, you get to start implementing an onboarding software that is sure to help your team be more successful with training, retention and productivity.

ClearCompany's **Onboarding Software** is more than just a tool for you to use on the first day of an employee's start date. It is an integrated system that can help you collect data and continue to improve your onboarding program for automation and employee retention. In fact, our total Talent Management Platform allows you to attract, hire and retain more top talent at your company.

**Schedule a free demo with us today!**

