Digital Onboarding Guide

A Guide to Moving Employee &
Contractor Orientations Online

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Digital Onboarding Today

Save time and money by converting your onboarding process into a digital one.

Digital onboarding enables companies to streamline the orientation process through the use of online apps. These applications can efficiently store new hires' training, credentials, contracts, signatures, and other important documents in a single, easily accessible platform.

When using these new onboarding apps, your employees only need to enter their data once. From there, you can send all sign-off documents required for onboarding and administrators can monitor their progress. Additionally, employees and contractors can access the system from any internet-connected device.

Tax documents, payroll documents, policy signoffs, confidentiality agreements, asset management forms, and much more can all be managed and monitored under one cloud application with less work than paper forms. You are no longer required to print out documents and gather them from new hires and contractors upon completion.

Once the orientation is created, it can be effortlessly distributed an unlimited number of times. This enables you to refine your message and ensure consistent delivery across the entire company, reaching both employees and contractors with a simple click. Moreover, these apps can serve as convenient reminders for expiring certificates or training, and they can even automatically assign refresher courses as needed.

These benefits are just the start when it comes to digital onboarding. The following sections will cover specific solutions, planning, and advice on how to incorporate these options into your onboarding system.

Modern Onboarding Solutions

This section will cover digital onboarding solutions to help streamline and organize your onboarding. Using these tools, companies have gained insights, cut costs, and increased consistency. Each tool solution may seem separate, but the applications are often integrated into a larger EHS software system. This allows them to give you the oversight required for modern onboarding.

Digital Forms

Onboarding paperwork can be as simple as sending your employees and contractors a link to the required digital documents. They can then fills out these documents and they are automatically saved in the system ready to be reviewed when required.

In a digital onboarding system, Digital Forms are the go-to for any traditional paper forms role. Whether it is a tax form, payroll, non-disclosure agreements, and emergency contact information can all be stored, organized, and monitored in one central location. No more filing cabinets, lost documents, or lengthy searches in a local office.

Digital onboarding can significantly reduce redundancies by automatically populating common data, such as names and employee numbers, across multiple onboarding and HR forms. This automation saves everyone time and effort during the onboarding process. Additionally, digital forms foster full transparency between the trainee and the company, with all required documents easily accessible in digital folders.
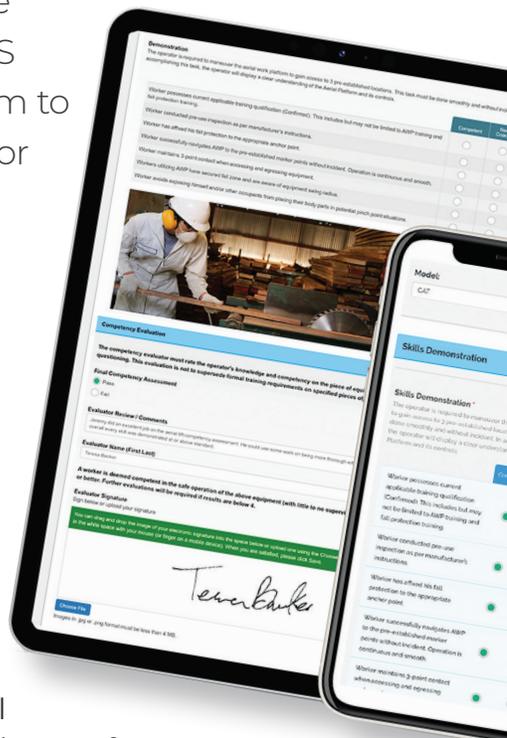
Orientation Videos

Imagine providing new hires with a link to their account, granting access to all orientation materials. They can view orientation videos, virtual site tours, meeting points, and messages at their convenience. Additionally, you'll be alerted when they complete these videos—especially helpful for safety or site orientations, delivering critical information like emergency meeting locations and evacuation protocols.

It's no surprise that more and more companies use custom orientation videos to consistently define their values. CEOs, team leads, and others can all film their own orientation or training videos and the new staff and contractors can view them as required.

Orientation videos can:

- Deliver key messages from department leads
- Deliver site tours
- Provide hazard awareness training
- Identify proper procedures
- Cover emergency response plans
- And much more

Onboarding software can also stitch separate videos into a cohesive whole which allows you to swap out portions of the video with new information or change the structure of the video without filming the entire onboarding over again.

Pre-qualification or Training Record Management Systems

Imagine having access to all of your contractors' credentials stored and organized in an accessible system within minutes of them logging in. Modern onboarding software allows employees to use their own mobile devices to snap photos of their credentials.

Contractors must often be onboarded quickly and thoroughly to gain site access. EHS onboarding software has grown in popularity because built in pre-qualification systems can do just that by collecting all their credentials and storing them on a cloud server accessible by everyone who needs to verify their information.

Electronic Signatures

Modern onboarding software has also simplified the task of collecting signatures or documentation for new hires with electronic signatures. Electronic signatures can help businesses ensure that employees have read and understood important safety and compliance information.

With all signatures stored in one application, management can easily see who has signed and who still needs to sign outstanding documents.

Employees and contractors can easily navigate the modern software and stay on top of the forms and agreements requiring their attention and signature.

Employee Management Applications

Onboarding software can customize an onboarding journey by role, location, or any other stipulation. It can also assist with role changes. Digital onboarding software has many solutions to help facilitate the changes or even automate the process. The second an employee's role is changed on the software system they can be auto sent all the newly required documents.

Employee management applications don't stop there. They also help with:

- Identity Verification
- Mitigating human error
- Fast compliance
- Multi-language support
- Auto-generated reminders
- Prioritization
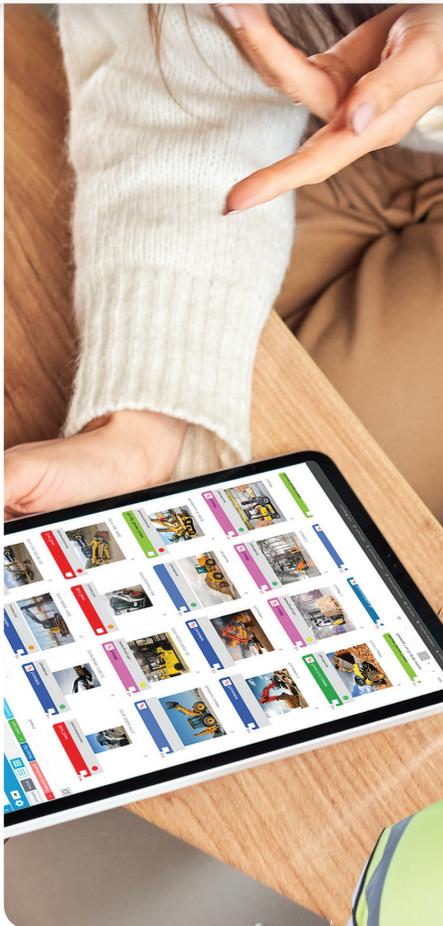
Asset/Equipment Management

If your new hire requires equipment, an asset management application will simplify administration and distribution. This software enables you to transparently and efficiently track the equipment your team possesses within an organized system.

Even if you switch to this method after you already distributed your gear in the field, employees can simply enter the serial numbers of equipment they have, digitally sign off, and all the data is conveniently gathered and stored in the system.

This modern software can manage your assets easier than paperwork. Many companies do this through the onboarding digital forms they assign trainees. Trainees can simply sign for equipment digitally and software tracks all their input from then on.

Real-time Reporting

Onboarding software provides real-time reporting and analytics, allowing businesses to monitor employee progress and identify areas for improvement.

An example of real-time reporting in digital onboarding could be the ability to track the progress of new hires as they complete the onboarding process. This could include tracking the completion of training modules, the submission of required documents, and the signing of important agreements or policies.

For instance, digital onboarding platforms often include a dashboard that allows HR administrators to view the status of each new hire in real-time. This dashboard might display metrics such as the percentage of training modules completed, the number of documents submitted, and the status of background checks or drug screenings.

The real-time reporting feature could also allow HR administrators to quickly identify any bottlenecks or delays in the onboarding process, and take action to address them before they impact the new hire's start date. This can help businesses ensure that new employees are fully onboarded and ready to contribute to the organization as soon as possible.

Custom Course Creation

Custom course creation can be an effective way to enhance onboarding programs. By creating tailored courses that are specific to your organization's needs and culture, you can improve engagement, retention, and job performance.

For example, in the energy sector, a custom course on safety procedures for working with high-voltage electrical equipment could be created using the site your new hires will work on daily. This course could cover topics such as lockout/tagout procedures, electrical hazards, personal protective equipment, and emergency response protocols. If it's created onsite, it's all the more relatable and valuable.

By offering this course to new hires, you can ensure that they have a solid understanding of the safety procedures and regulations that are critical in the energy sector.

Companies frequently make their own courses for:

- Relatability
- Consistency
- Improved safety
- Revenue/monetization
- Cutting-edge information
- Unique protocols

Many companies have monetized courses they've created for onboarding by offering them as part of a broader onboarding package to other companies in similar fields. Many more have offered standalone courses that companies can purchase as needed.

Companies create their own courses for onboarding when they can't find the exact message or training, they require. It's no surprise that after creating them they find others who require the same knowledge for their staff and are willing to pay for it.

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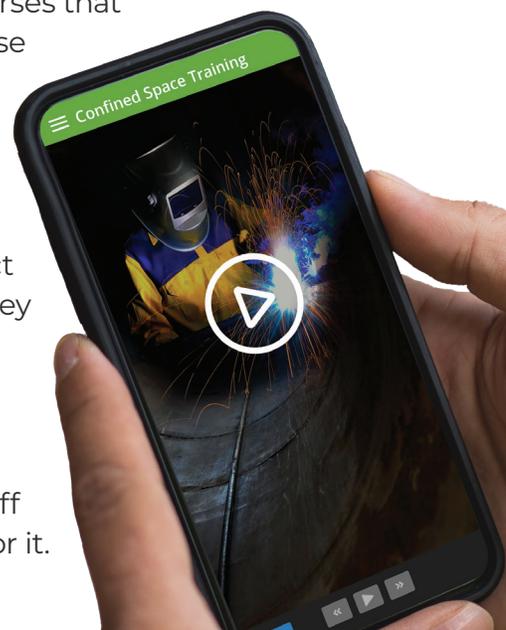
Planning Your Onboarding

Planning your digital onboarding program requires careful consideration of your organization's needs, goals, and resources. Here are some steps to help you plan your digital onboarding program using modern software tools such as digital forms and asset management tools:

1. Identify your onboarding goals

Before you start creating your digital onboarding program, you need to identify the goals that you want to achieve. For example, you may want to improve the efficiency of the onboarding process, reduce errors and delays, or ensure that new hires have a consistent and engaging experience.

2. Choose the right software tools

Once you have identified your goals, you need to choose the right software tools to support your digital onboarding program. Digital forms and asset management tools can be particularly useful in streamlining the process and ensuring that all necessary information and resources are readily available.

3. Map out your onboarding process

The next step is to map out your onboarding process, from initial offer acceptance to the end of the probationary period. Identify the various steps and tasks involved in the process and determine how you can use digital tools to streamline and automate these tasks.

4. Test and refine your onboarding program

Once you have created your digital onboarding program, you need to test and refine it to ensure that it is effective and efficient. Solicit feedback from new hires, managers, and HR staff to identify areas for improvement and make adjustments as needed.

Many of the lower price software options utilize set fees for every employee or contractor onboarded. Typically, these systems range between

$12-$15
per onboarded employee

Some lower-cost onboarding systems do charge monthly because you have ongoing access to other features in their system. Lower-cost systems are usually between

$6-$15
per employee/month

Digital Onboarding Software Pricing

The prices for digital onboarding software can vary widely depending on the features, scalability, and level of customization offered by the software. Here are some examples of high and low prices for digital onboarding software, based on information from vendor websites and industry reports.

Low Prices

These digital onboarding applications can vary in their specific features. Common ones include:

• **User-friendly interface:** These applications typically have a simple and easy-to-use interface

• **Identity verification:** These may include ID scanning or biometric video monitoring

• **Document capture:** Users can upload or take photos of required documents, such as training certifications, passports, or driver's licenses and store them for future review.

• **Data encryption and security:** Digital onboarding applications generally have security features to protect users' personal and sensitive data, such as data encryption, secure storage, and compliance with relevant privacy regulations.

• **Customizable workflows:** These systems allow businesses to customize the onboarding process to suit their specific needs like collecting additional data or integrating with existing systems.

• **Integration with third-party services:** Onboarding applications in this price range can often integrate with third-party services, such as payroll applications

• **Mobile compatibility:** Many lower-cost digital onboarding applications are designed to be mobile-friendly.

• **Analytics and reporting:** Digital onboarding applications often provide analytics and reporting tools that enable businesses to identify trends and optimize the onboarding process over time.

The more expensive onboarding systems typically charge per month for each employee profile you create because you have ongoing access to other features in their system. These high-price options can start at

$20
per employee/month

It's important to research and compare different options to find the best fit for your organization's needs and budget

High Prices

Some of the key features of these applications may include:

• **Biometric Authentication:** This feature enables users to verify their identity using their unique biological characteristics such as facial recognition, fingerprints, and voice recognition.

• **Artificial Intelligence (AI)** and **Machine Learning (ML):** These technologies can be used to automate parts of the onboarding process, such as data entry and document processing.

• **Document Management:** Expensive onboarding applications typically allow users to upload, store, and manage digital documents related to the onboarding process, although it should be noted that cheaper alternatives also have these systems.

• **Customizable Workflows:** These applications may also offer customizable workflows that enable organizations to tailor the onboarding process to their specific needs.

• **Advanced Analytics:** Many systems have robust built-in analytics tools that allow organizations to track and analyze various aspects of the onboarding process.

• **Mobile Accessibility:** Expensive onboarding applications are often optimized for mobile accessibility.

• **Compliance and Security:** Expensive onboarding applications typically have robust security features to protect sensitive data and ensure compliance with various regulations such as GDPR and HIPAA.

Some vendors may offer additional discounts or custom pricing based on the size of the organization or the duration of the contract. It's important to research and compare different options to find the best fit for your organization's needs and budget.

Transitioning Your Onboarding

Transitioning to digital onboarding can be a big undertaking for any organization, yet the growing popularity certainly suggests it pays off. Here are some steps to help make the switch and ensure a smooth transition:

STEP 1

Identify your needs and goals

Your first step in creating a shortlist should be compiling a list of features you feel you require and others that will decrease workloads. If you are unsure about what you'll need, we've compiled an "Industry-Specific Features and Needs" section below that should help you focus your requirements

STEP 2

Choose the right software

Once you have identified your needs and goals, you need to choose the right software to support your digital onboarding program. Look for software that is user-friendly, customizable, and can integrate with your existing HR and payroll systems.

STEP 3

Train your team

It's important to provide adequate training and support to your HR team and new hires to ensure they are comfortable using the new system. Schedule training sessions, provide documentation, and offer ongoing support to address any questions or concerns.

STEP 4

Make a phased transition

To minimize disruption and ensure a smooth transition, it's best to make a phased transition to digital onboarding. Start with a pilot group or a single department and gradually roll out the new system to the rest of the organization.

STEP 5

Communicate the changes

Communication is key to ensuring a successful transition to digital onboarding. Make sure to communicate the changes to all stakeholders, including HR staff, managers, and new hires. Explain the benefits of the new system and provide clear instructions on how to use it.

In summary,

transitioning to digital onboarding requires careful planning, training, and communication to ensure a smooth and successful transition.

By choosing the right software, making a phased transition, and engaging stakeholders throughout the process, organizations can streamline and improve their onboarding process while providing a better experience for new hires.

What Can Help During the Transition?

• **Project plan:** Develop a detailed project plan with timelines, milestones, and responsibilities to help keep the transition on track.

• **Stakeholder engagement:** Engage key stakeholders, such as HR staff, managers, and new hires, throughout the transition process. Solicit feedback and address concerns to ensure buy-in and adoption of the new system.

• **Testing:** Test the new system thoroughly before rolling it out to ensure that it meets your organization's needs and works as expected.

• **Customization:** Customize the software to meet your organization's specific needs and workflows.

• **Metrics and evaluation:** Set metrics and evaluate the success of the new system to identify areas for improvement and make adjustments as needed.