Building the Business Case for *Onboarding Technology Systems*

Business Builder

Brandon Hall
—**GROUP**—

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Management

Brandon Hall Group Research Team

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Executive Summary

With the improved economy and reduced unemployment, globalization, shifts in workforce demographics, and the shortage of critical skills, organizations of all sizes are facing intense pressure to retain the quality talent they struggled to attract and hire.

Organizations are shifting from a labor-intensive, administrative onboarding approach to one that employs technology to automate the paperwork, document management, training, and compliance requirements, and, most importantly, provide the new hire with a better experience that is consistent with the organization's culture, brand, and value proposition. The workforce is becoming more complex and demanding, and new hires are at a high risk of changing employers. Leading companies are responding by taking a more proactive approach to onboarding.

This tool will help companies build a business case for investing in an onboarding technology, either as a point-solution or part of a platform, by helping to identify the challenges, internal pressures, unique onboarding requirements and key stakeholders involved with onboarding.

This report will explain:

- Why companies need to rethink their onboarding process.
- How an investment in an onboarding system (or a platform that includes onboarding) will drive business outcomes
- How an onboarding system, which offers advanced capabilities such as support for training and learning content, will improve the new-hire experience, and thereby increase engagement, reduce time-to proficiency, reduce voluntary attrition, and give new hires insight on future development opportunities.

Notable Insight

This tool will help companies build a business case for investing in an onboarding technology by helping to identify the challenges, internal pressures, unique onboarding requirements, and key stakeholders involved with onboarding.

The Agenda

- **Business Impact:** Research that validates the return on investment.
- **Business Need:** What are the top challenges for onboarding?
- **Solution:** What is a next-generation onboarding system?
- **Questions to Consider:** What are the questions organizations must ask themselves before making an investment?
- **Building a Business Case:** What are the action steps to gain buy-in?
- **Stakeholder Analysis:** Who are the key stakeholders and what do they need to know?
- **Metrics:** How to measure the real impact for your business.

Business Impact

Overall, high-performing organizations[1] are more likely than other organizations to have a dedicated onboarding technology solution (45% vs. 21%). In fact, their acquisition of an onboarding technology solution increased from 31% in 2016 to 45% in 2017.
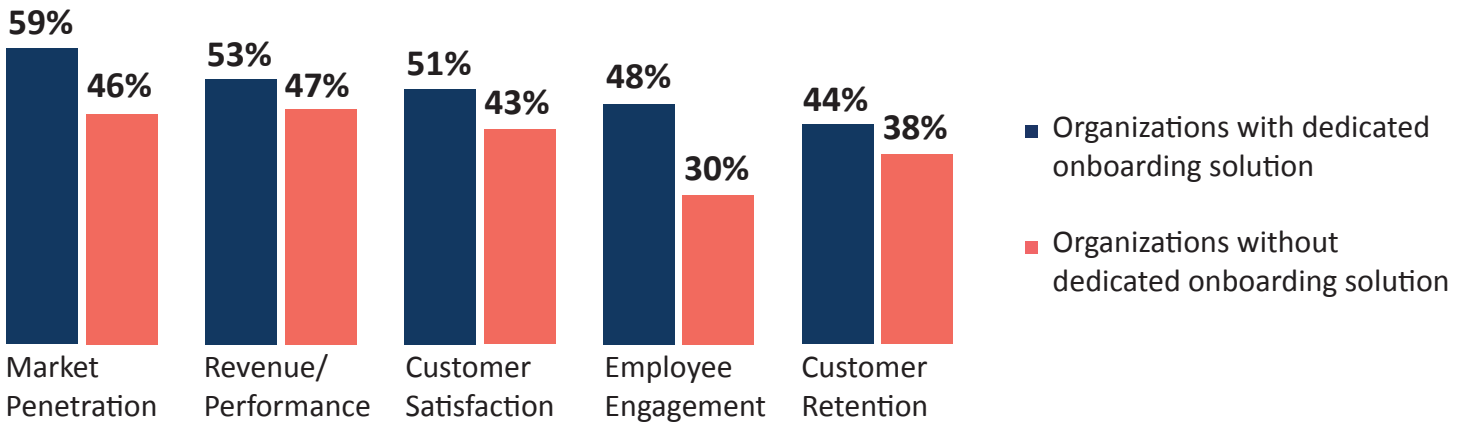
In addition, organizations with a dedicated onboarding solution are 16% to 60% more likely than other organizations to see increases in customer retention, customer satisfaction, and employee engagement. (It is important to note that other factors outside of onboarding may have also contributed to the increase in business metrics.)

Notable Insight

Organizations with a dedicated onboarding technology solution are more likely to be a high-performing organization than those without a dedicated onboarding technology solution.

[1]High-performing organizations are shown through survey results to see overall year-over-year improvement across these criteria: employee engagement, organizational revenue, customer satisfaction, voluntary turnover, and organizational productivity.
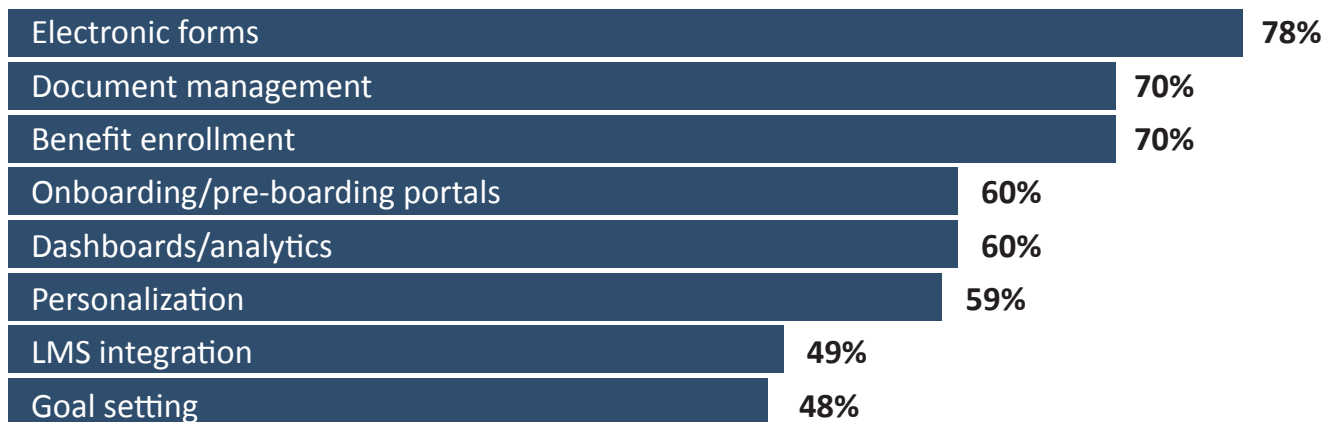
Business Metrics Increased From Past Year

		Organizations with dedicated onboarding solution	Organizations without dedicated onboarding solution
Market Penetration		59%	46%
Revenue/Performance		53%	47%
Customer Satisfaction		51%	43%
Employee Engagement		48%	30%
Customer Retention		44%	38%

Source: 2017 Brandon Hall Group Evolution of Onboarding Study (n=353)

Organizations are looking for onboarding technology solutions that help streamline management of the process, improve the new-hire experience, provide metrics that explain onboarding's contribution to organizational performance, and connect candidates to their future path of personal and professional development.

Most-Important Onboarding Technology Functionalities

Functionality	Percentage
Electronic forms	78%
Document management	70%
Benefit enrollment	70%
Onboarding/pre-boarding portals	60%
Dashboards/analytics	60%
Personalization	59%
LMS integration	49%
Goal setting	48%

Source: Brandon Hall Group 2017 Evolution of Onboarding Survey (n=353)

Business Need

KEY TAKEAWAYS

- High-performance organizations are adopting onboarding technology at a rapid pace.
- Onboarding technology contributes to the improvement of key performance indicators, especially in the area of employee engagement.
- Onboarding technology streamlines the management of the process, provides a good new-hire experience, and can connect new hires to their future career path.

Brandon Hall Group research shows that optimizing the onboarding process (52%) and onboarding technology (44%) are top priorities. As such, onboarding is being shifted from an administrative function to a strategic business endeavor. About one-third of organizations (31%) have a stable or optimized onboarding process, and 51% are developing a formal process. Only 18% have a casual or ad hoc process.

The reason for this shift is that organizations competing vigorously for talent need to ensure that they engage, retain, and train their new hires. Metrics deemed most important by the majority reflect this emphasis and include: new hire retention (73%), new hire engagement (62%), and time-to-productivity/proficiency (58%).

This intense focus is also mirrored in the budget. Brandon Hall Group's latest technology research shows that, on average, onboarding technology represents 23% of the talent acquisition technology budget and that 28% percent expect an increase in the onboarding budget.

ACTION PLAN

Answering these questions will help you articulate the business need back to business leaders.

Challenges

? What are your greatest onboarding challenges?

Strategy

? Is your existing onboarding process and technology helping to improve your business strategy?

Change

? What is at stake if you do not make a change now?
How will your business be impacted?

Notable Insight

Onboarding is being shifted from an administrative function to a strategic business endeavor. The reason for this shift is that organizations competing vigorously for talent need to ensure that they engage, retain, and train their new hires.

Solution

KEY TAKEAWAYS

- Onboarding solutions automate the entire new-hire experience, from signing the offer letter through the duration of the onboarding.
- These systems offer advanced capabilities, including social and analytics.
- These systems can have a dramatic impact on new hire engagement.

For many organizations, onboarding traditionally has been an administrative process, with employment paperwork, documentation, and company policy the limit of most onboarding processes. This approach does little to impact new-hire engagement, assimilation, and training, and in fact may result in new-hire attrition, inconsistent training, and disengagement.

Strategic onboarding encompasses the entire new-hire experience from signing the offer letter through the first few weeks or months of employment. Brandon Hall Group's 2017 research shows that the duration of onboarding is on average 29 days, and that excludes pre-boarding practices.

Two-thirds of organizations have an onboarding process that lasts 4 weeks or less, and 33% spend up to the first year for onboarding. It is nearly impossible to have a strategic onboarding process that is ongoing without enabling technology.

Notable Insight

Strategic onboarding encompasses the entire new-hire experience, from signing the offer letter through the first few weeks or months of employment. It is nearly impossible to have a strategic onboarding process without enabling technology.

How Technology Impacts the New-Hire Experience

Onboarding technology systems foster a positive and engaging new-hire experience and an intuitive user/admin experience through:

- A pre-boarding portal
- An onboarding portal
- Personalized content based on candidate occupation, location or other criteria
- New-hire self-service applications
- Assessments
- Task/document management
- Global configuration
- Social capabilities
- Goal-setting capabilities
- Integration capabilities with other systems, such as an LMS

Source: 2017 Brandon Hall Group Evolution of Onboarding Survey (n=353)

Answering these questions can help you clearly articulate how an onboarding system would enable business outcomes.

Existing Technology

? How is an onboarding solution different from the administrative onboarding approach?

Capabilities

? What are the key capabilities that will improve business outcomes?

? How will new technology support our overall corporate objectives?

Understanding Resources

With an investment in an onboarding system, organizations will need to consider the following questions related to resources.

Budget

- What is our budget for onboarding technology?
- What are we currently investing in and what are we planning to invest in for the future?

Determining the organization's onboarding technology budget is critical before moving forward with selection. When companies invest in on-premise solutions, IT departments typically are responsible for HR technology. When companies invest in SaaS or cloud solutions, HR becomes responsible for the budget. When thinking about the budget, companies should consider what they have spent in the past, what they can spend today, and what is realistic for the future.

Notable Insight

When companies invest in on-premise solutions, IT departments typically are responsible for HR technology. When companies invest in SaaS or cloud solutions, HR becomes responsible for the budget.

Pricing

- What is the cost of the onboarding system?
- What is the pricing model available to us?
  - ⇨ *Pay per user, subscription model, licensing model, implementation fees, etc.)*
  - ⇨ *What is the financial impact of not acquiring an onboarding technology solution?*
- What happens if the price escalates after the first year?
- What happens if our needs change and we are hiring more/less employees than anticipated?

After determining the budget, understanding pricing options is a critical component for selecting an onboarding system. Since many factors influence pricing, it is nearly impossible to compare different pricing models for these systems. The most important thing to be aware of is how much you are spending for every aspect of product capabilities, implementation, and upcoming releases. You can combat this challenge by asking very detailed questions about pricing. You also must plan for additional costs such as implementation services, training or additional users.

As a point of comparison to the pricing for the new onboarding technology solution, examine any current losses resulting from the current onboarding process. For example, are you experiencing high new-hire attrition rates? Brandon Hall Group's 2017 Evolution of Onboarding Study shows that the average overall new-hire voluntary attrition rate is about 10.2%. There are many expenses related to these voluntary attrition levels, including cost-per-hire; the need to replace the "lost" new hire; the salary paid to the lost new hire; the time, money and resources spent on onboarding the "lost" new hire; and any missed opportunities, such as lower production levels, missed sales, and more.

Notable Insight

As a point of comparison to the pricing for the new onboarding technology solution, examine any current losses resulting from the current onboarding process.

Calculate the Cost of New-Hire Attrition

		Your Responses
A	Total number of new hires (all hires - including new positions and replacements for departures) made during the year.	A
B	Number of new hires voluntarily resigned during calendar year.	B
C	Number of resigned hires replaced with other new hires.	C
D	Total hires made due to voluntary attrition rate during calendar year (**B** plus **C**).	D
E	Overall average cost-per-hire*.	E
F	Preliminary cost-per-hire due to attrition (**D** multiply by **E**).	F
G	Calculate total salary and benefits paid to new hires that voluntarily resigned. Take average monthly salary and benefits for each hire and multiply by average number of months employed per resigned hire (**B**).	G
H	Enter total expenses for a year's onboarding/training, travel, technology, and resources.	H
I	Calculate per-hire cost of onboarding/training, travel, technology, and resources (Divide **H** by total number of new hires (**A**)).	I
J	Onboarding/training expense for new hires that voluntarily resigned (**I** multiplied by **D**).	J
K	Cost for missed opportunities during vacancy (before replacement). This includes variables such as lost sales, reduced productivity, overtime incurred by remaining employees, etc. (Do the best you can with to determine this figure, and if you don't have the data, this may be something you want to work on developing to help make your case for the cost of new-hire attrition).	K
L	**Total cost due to new hire voluntary attrition (Add F, G, J, K).**	L

*Cost-per-hire is the ratio of the sum of external costs plus internal costs to the total number of hires in a specified time period. External costs can include third-party agency fees, advertising, travel, etc. Internal costs can include the fully-loaded salary and benefits of the recruiting team, physical infrastructure and more. See definition by SHRM and ANSI. If this information is not readily available, use the average cost-per-hire published by SHRM in 2016, which is $4,129. This cost-per-hire is across a variety of different industries.

Implementation

- Do we need third-party support for implementation?
- What is a realistic implementation timeframe?
- Will HR or IT own implementation?
- Do we need training post implementation?
- Do we need a global implementation strategy?

Implementation is challenging for many companies and frustrating when you have expectations about when and how you will be able to use your system. You must develop a plan for rolling out technology – possibly by region or by business unit. You should also be patient when implementation does not go smoothly and plan accordingly with additional resources if needed.

Timeframe

- When do we need to revisit our existing contracts with our technology providers?
- When do we need to upgrade our HRMS, ERP or other technology solutions, such as Learning Management or Talent Acquisition? The onboarding solution may need to be integrated with those other systems.

Companies often look to replace technology when it is time to upgrade their existing ERP or HRMS technology. You should look at what options are available and if a new system will be able to meet its individual workforce needs. Considering a timeline will depend on the company's existing technology and its readiness to change.

Notable Insight

Be patient when implementation does not go smoothly and plan accordingly with additional resources if needed.

Delivery Model

- What is our preferred delivery model?
- If we currently use on-premise solutions, what resources do we need internally to support a SaaS or cloud-based system?

Many organizations have a delivery model preference or requirements based on their overarching company strategy and policies. For example, industries with high security needs require an on-premise or hosted model. The majority of onboarding solution providers offer an on-demand Software as a Service (SaaS) model or a cloud-based solution. SaaS provides configurability needed for a company in growth mode.

Integration

- How will we handle integration?
- What existing solutions do we need to integrate with, and how will this integrate with our existing ERP or HRMS, and/or LMS?

This high degree of integration in talent acquisition and onboarding, which can be included in the talent acquisition platform, can feel overwhelming for organizations feeling pressure to select and implement a system in a short period of time. In order to maximize the level of investment in these systems, you should consider the long-term implications of an integrated strategy and begin any communications and change management to support this strategy before investing in a system.
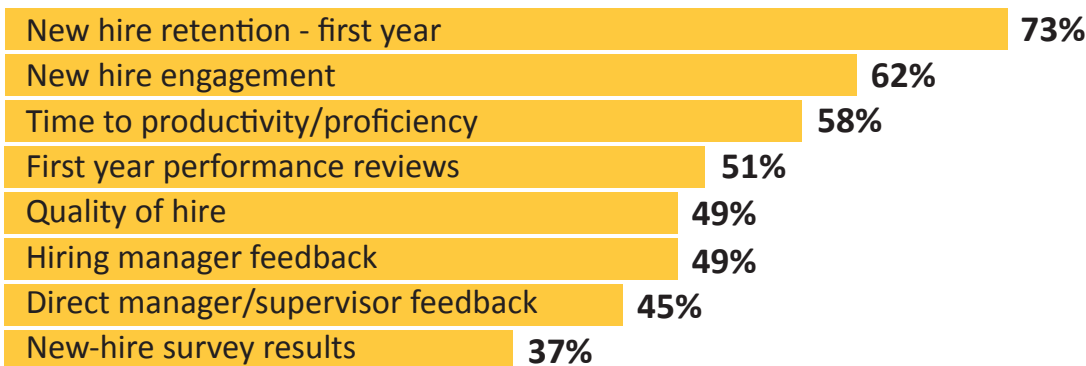
Notable Insight

In order to maximize the level of investment in these onboarding systems, consider the long-term implications of an integrated strategy and begin any communications and change management to support this strategy before investing in a system.

Metrics

- How do you measure the real impact for your organization?
- What metrics do you need to measure the effectiveness of your onboarding system?
- How will this system enable time-to-productivity/proficiency, new hire engagement, new hire retention, and quality of hire?

Business metrics, such as customer satisfaction, revenue, and HR efficiencies, in addition to the traditional onboarding metrics such as time-to-productivity/proficiency, are needed to measure the impact on your organization.

Most-Important Onboarding Metrics

Metric	%
New hire retention - first year	73%
New hire engagement	62%
Time to productivity/proficiency	58%
First year performance reviews	51%
Quality of hire	49%
Hiring manager feedback	49%
Direct manager/supervisor feedback	45%
New-hire survey results	37%

Source: Brandon Hall Group 2017 Evolution of Onboarding Survey (n=353)

New-Hire Experience

- How will this solution improve the new-hire experience?
- Is the technology simple and engaging?
- Does the new-hire experience with the technology match our employer brand?

According to Brandon Hall Group's 2017 Onboarding research, the top-cited reasons for acquiring a dedicated technology solution are to improve the new hire experience (83%), improve management of the process (70%), and alleviate manual tasks (68%). This emphasis on the new-hire experience is in alignment with HR's desire to improve the user experience for all solutions, whether

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Business metrics, such as customer satisfaction, revenue, and HR efficiencies, in addition to the traditional onboarding metrics, are needed to measure the impact on your organization.

it be for talent acquisition, learning, HRIS, or workforce management systems. Organizations realize that an engaging user experience, which reflects the organization's employer brand, leads to an engaged employee. And engagement is intrinsically linked to organizational performance. In addition, if the system is not user-friendly, intuitive and engaging, employees will avoid the solution and waste HR resources. Technology solutions should provide a simple experience that encourages better communication and engagement for all stakeholders: employer, employee, new hire, and candidates.

Training Capabilities

- How critical is it that the onboarding solution support training?
- Which training features are critical to include in an onboarding technology solution?
- How can new hires be given line of sight to development opportunities at organization?

Most organizations consider these elements of training to be important or critical to be included in their onboarding: orientation on policies, values, mission (93%), overall product, service, job training (86%), orientation on diversity and inclusion (73%), mentoring (65%), and assessments (55%).

An onboarding solution that can be integrated with the organization's LMS will provide new hires with guidance on potential career paths and developmental opportunities. In addition, that information will make it easier for the new hires to create goals for their future development.

Training during onboarding delivers a big impact. Organizations with effective training practices are more likely than their counterparts to have seen an improvement over the past year in revenue/performance (59% vs. 40%), market penetration (56% vs. 43%), employee engagement (42% vs. 30%), and employee retention (27% vs. 10%).

Notable Insight

Training activities are important because they contribute to employee engagement, the ease of assimilation, and overall organizational performance.

Onboarding solutions that support training/learning and development, mentorship, assessments, and learning content contributes to employee engagement, ease of assimilation, and overall organizational performance.

Building a Business Case

Based on qualitative and quantitative research, Brandon Hall Group identified several critical steps for building a business case and moving forward with an onboarding system investment.

Identify a Champion. Organizations tend to struggle with clearly articulating and quantifying the value that they will receive from the investment. You should consider including a senior leader outside of Talent Acquisition/Onboarding/Learning & Development to champion the initiative and the funding request as a way to help to bridge the gap between the business and onboarding.

Build Your Internal Team. In order to evaluate and select a technology solution, identify a "selection committee" responsible for creating RFPs, scheduling demos, and evaluating providers. IT professionals, procurement professionals, HR professionals and business leaders are often included in these meetings.

Timeframe for Selection. Ensure that the selection process has a realistic timeframe that fits in with overall organizational projects and objectives. If IT has several other selection projects in place, onboarding may need to adjust its timeframe.

Notable Insight

Consider including a senior leader outside of Talent Acquisition/ Onboarding/Learning & Development to champion your technology initiative as a way to bridge the gap between the business and onboarding.

Identify a List of "Must-Haves". Consider your unique onboarding needs before investing in an onboarding system and determine "must haves" and "nice-to-haves" when selecting a system. Organizations will typically identify "must-haves" in terms of functionality, technical requirements and solution provider viability. This is not meant to serve as a list of requirements but rather a general understanding of what priorities are in place depending on the line of business, size and geography.

Measure the Effectiveness. Although most organizations will be able to determine the effectiveness shortly after going live with their system, companies must define the metrics for success prior to selection. You should continually evaluate and measure this efficiency to make a case for this system. The most common metrics measured for an onboarding system include time savings, cost savings and compliance, and time-to-productivity/proficiency. Additionally, look at quality of hire, productivity, and, new-hire retention rates.

Develop a Change Management Strategy. Any technology change typically requires some level of change management. It provides a transition to the future state and for some organizations this can involve moving from a paper-based process and for others, moving off of a legacy system. In most cases, change management begins at the leadership level and requires strong communication to employees expected to use the system. A successful change management program will have a tremendous impact on adoption rates.

Begin Communication. A communication strategy should be developed to articulate the need for the technology investment with key stakeholders and overall business leaders. This communication strategy should be revisited regularly through the selection process as well as implementation.
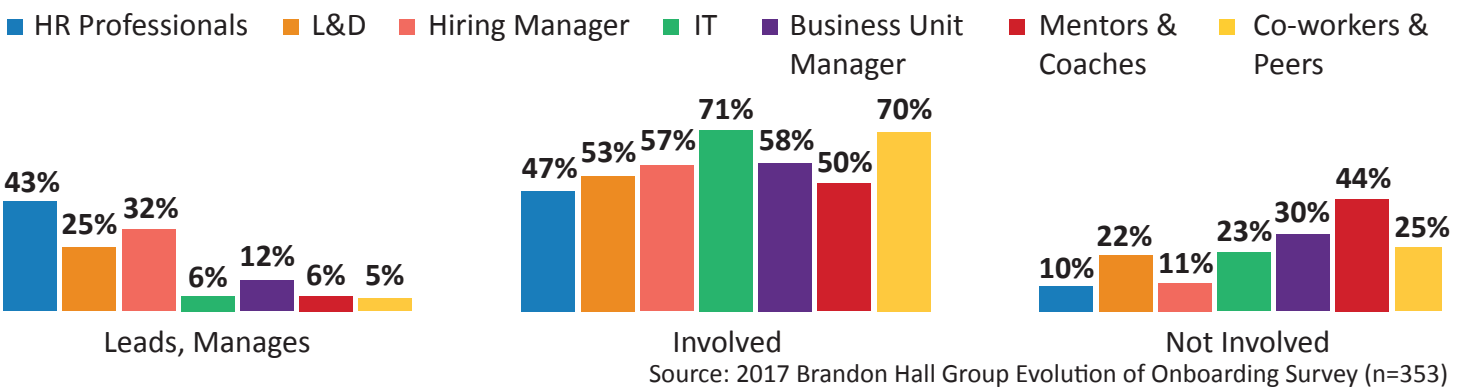
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Stakeholder Analysis

Onboarding includes key players such as hiring managers, recruiters, learning and development professionals, IT, managers, and leaders. Managing these relationships and understanding their interaction across key practices is a critical part of any onboarding strategy. More importantly, it is critical when investing in an onboarding system. These different stakeholders evaluate the impact of onboarding in different ways, and communicating with them requires a focus on different metrics. Below we offer a list of key players, their typical roles in acquiring an onboarding system, and the critical metrics that must be tracked in order to help them see progress.

Involvement of Roles in Onboarding

■ HR Professionals ■ L&D ■ Hiring Manager ■ IT ■ Business Unit Manager ■ Mentors & Coaches ■ Co-workers & Peers

Leads, Manages: 43%, 25%, 32%, 6%, 12%, 6%, 5%

Involved: 47%, 53%, 57%, 71%, 58%, 50%, 70%

Not Involved: 10%, 22%, 11%, 23%, 30%, 44%, 25%

Source: 2017 Brandon Hall Group Evolution of Onboarding Survey (n=353)

Key Players in Onboarding and their Concerns

Stakeholder	Interests	Metrics
HR Professionals	Integration, Analytics, Document Management, Task Management, Task Management, New Hire Experience, Analytics	Time-to-Productivity/Proficiency, New-Hire Engagement, New-Hire Retention, New-Hire Survey Results, Direct Manager Feedback, Quality of Hire
IT Professionals	Integration, Set-up	Time to Onboard, Adoption Rates
Hiring Managers	Analytics, User/New-Hire Experience	Quality of Hire, New Hire Retention, New Hire Survey Results, Direct Manager Feedback, New-Hire Engagement
Learning & Development	Course Completion, Course Satisfaction, Assessments, Performance, Content Management, Mentorships, Goal-Setting	Time-to-Productivity/Proficiency, New-Hire Engagement, New-Hire Survey Results, Performance Reviews, Quality of Hire
External Stakeholders - Department Managers, Business Unit Managers	Performance, Turnover, Quality of Hire	Time-to-Productivity/Profiency, New Hire Engagement, New-Hire Retention, Performance, Quality of Hire

Source: Brandon Hall Group 2018

Critical Metrics for Key Players

Translating Metrics

HR Professionals	HR Professionals want an onboarding system that automates the entire process from pre-boarding through onboarding, provides an engaging user experience, increases time-to-productivity/proficiency, encourages collaborations, and increases new-hire retention. This technology should provide HR leaders with the information they need to support increasing new-hire retention levels, improving time-to-productivity/proficiency, meeting compliance requirements, and onboarding's contribution to overall organizational performance.
IT Professionals	IT departments are often responsible for training new hires on adopting these systems and will need to plan accordingly. Additionally, they will need to know to support onboarding system, particularly if the solution needs to be integrated with other systems.
Hiring Managers	Hiring managers are concerned that their quality hires are retained, engaged, assimilated into the organization, and quickly up-to-speed on productivity. Provide metrics that support how the onboarding technology improves the new-hire experience, increases new-hire retention, and improves time-to-proficiency.
Learning & Development Professionals	Learning professionals want a strong correlation between learning and performance. This technology should provide learning leaders with the information/content they need to support competency and skills progression, as well as metrics related to time-to-proficiency and new-hire experience.

Source: Brandon Hall Group 2018

Metrics

Defining metrics to evaluate technology is a challenge. It may seem clear why cost, time and quality are important, but how can organizations ensure their solutions are improving these areas? Below are a few ideas for correlating your technology with your onboarding metrics. Although these metrics are the most common onboarding metrics, some may not be critical to every company. Organizations should define the metrics they want to track in advance and determine how to communicate these metrics with key stakeholders.

Correlating Technology with Onboarding Metrics

Metrics	Business Impact	Benefit of Technology
New Hire Retention	Measuring new-hire first-year retention rates, and retention at 30, 60, 90, and 180 days.	Companies can assess engagement through new hire surveys, and a Net Promoter Score. Engagement leads to retention. Companies can provide a more engaging experience through their pre-boarding and onboarding portals and by providing technology that encourages collaboration, learning, and welcoming activities. Companies can provide a more engaging learning experience through technology.
Adoption Rates	Measuring the adoption of technology by new hires, and users (admin)	Companies can offer new hires and administrative users an easy-to-use and innovative solution.
Cost	Measuring the reduction of costs associated with onboarding including HR administrative costs and external services and the increase in new-hire retention, while increasing the return on investment	Companies can reduce cost if there are fewer external resources needed, and if there is a reduction in attrition. Companies can save costs by eliminating paper-based processes and improving the overall efficiency. Companies can reduce the cost of maintaining an on-premise system including maintenances fees and the cost of implementation and upgrades.
Time	Measuring increased time-to-productivity/proficiency	Companies can save time by lifting the administrative burden improving efficiencies. Companies can save time by onboarding and training new hires efficiently. Companies can save time by making it easier to train new hires.

Source: Brandon Hall Group 2018

About Brandon Hall Group

Brandon Hall Group is a HCM research and advisory services firm that provides insights around key performance areas, including Learning and Development, Talent Management, Leadership Development, Talent Acquisition, and HR/Workforce Management.

With more than 10,000 clients globally and almost 25 years of delivering world-class research and advisory services, Brandon Hall Group is focused on developing research that drives performance in emerging and large organizations, and provides strategic insights for executives and practitioners responsible for growth and business results.

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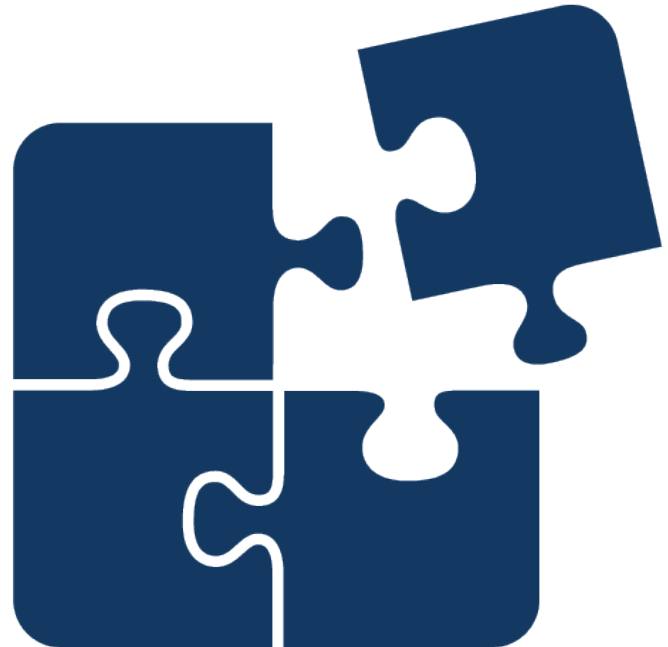- Maturity Model
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