

Fast-track your automated onboarding: A checklist




Save time and cut costs by automating repetitive onboarding tasks—simplify the process and watch both the hours and dollars add up. Companies with effective onboarding see 2.5x revenue growth.

1. Create and assign onboarding tasks for each role

Define key onboarding tasks for HR, IT, and other teams.

Automatically assign tasks based on each new hire's role and start date to ensure nothing gets missed.


Install  Jira Misc Workflow Extension (JMWE) to automate task creation and make the assignment process effortless and precise.

Bonus benefit: Reducing manual task assignments cuts down on errors and saves your team valuable time, contributing to overall cost savings.

2. Prepare all required onboarding documents in one place

Gather essential policies, handbooks, and documents before the new hire's first day.

Organize documents so they're easy to access for new employees.


Use  Comala Document Management (CDM) to automate the approval process for onboarding documents so everything is ready and accessible on day one.

Scalability note: Whether you're onboarding 5 or 50 employees, automating document management ensures everyone gets what they need without overwhelming your HR team.

3. Notify teams of their onboarding responsibilities

Make sure IT, HR, and other departments are informed of their tasks, like setting up equipment or creating accounts.


Send out automated reminders to keep everyone in the loop.

Set up  JMWE to automatically alert the right team members when it's time to complete their tasks.

4. Track onboarding progress and follow up where needed

Monitor how your new hires are progressing through their onboarding steps.

Focus on supporting new hires by addressing any issues or providing extra resources where needed.


Add  Dashboard Hub for a real-time view of progress, helping you check in and provide additional support to ensure new hires feel guided through the process.

Added value: Tracking progress not only helps with deadlines, but also improves the new hire's experience, keeping them engaged and setting them up for success from day one.

5. Set deadlines and automate task reminders

Assign clear deadlines for each task to keep onboarding on track.


Automate reminders so tasks don't fall through the cracks.

Use  Time to SLA to set deadlines and reminders, keeping everyone on the same page without manual follow-ups.

6. Review and optimize the onboarding process regularly

Check how long each task takes, and gather feedback from new hires to see where improvements can be made.

Look for patterns to optimize the process for future onboarding.

Track performance metrics with  Dashboard Hub to continuously improve the onboarding process.

Track this: Pay attention to key metrics like time-to-productivity, task completion rates, and new hire satisfaction to continuously improve the onboarding process.

Conclusion:

Automating your onboarding process doesn't just save time—it makes everything smoother for your team and your new hires. Use this checklist to save hours (and dollars) while giving your new employees a better experience from day one. Start saving time and effort with apps like JMWE, Comala Document Management, Dashboard Hub, and Time to SLA today. [Reach out to Modus Create to get started.](#)

