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Scalable Workforce Onboarding for Fast-Growing Brands

A guide with everything you need to know to onboard effectively

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Introduction to Onboarding

Onboarding is a critical stage in any business or workforce relationship, whether it is with an employee, a service provider, a seller in a marketplace platform or another B2B channel partner. In the frenzy of fast growth, however, companies sometimes overlook this pivotal stage.

The impact of a great onboarding experience cannot be overstated, because it creates conditions for a fruitful and long-term partnership. Onboarding is the first chance your organization gets to show why someone would want to work for or with your company — and why both of you are going to excel together.

Companies that excel at onboarding realize it is a multifaceted process contingent upon technical infrastructure, marketing savvy, user engagement, great design and effective training.

But with thoughtful planning, one step at a time, you can turn this challenge into a growth engine that differentiates you from the competition.

The Hidden Opportunity in Onboarding

Within the thrill of fast growth, it's not unusual for companies to react with one swift tactic: hire, hire, hire. But, to ensure these hires maintain momentum rather than stymie growth, it's vital that human resources aren't wasted on processes that can be automated.

Onboarding offers a way to keep hiring scalable; processing and training each new member can be both automated and meaningful. This helps the people who work for you or engage directly with your customers to achieve their desired outcomes, which increases revenue and controls costs. Clearly defining and communicating what your organization can do for its employees and partners is like adding rocket fuel to your company's growth.

A successful workforce onboarding process also minimizes the costly problem of churn — and keeping churn under control is key to continued growth.

Consider the problem of churn just in traditional employee arrangements: **Equifax** finds that half of workers who leave their jobs voluntarily do so within 12 months of their hire, and **CareerBuilder** found that 21 percent of people surveyed were planning to leave their jobs within a year.

That kind of churn is expensive. Some **estimates put the direct replacement costs at 60 percent of the departing employee's salary** and total costs (which include lost productivity) at 150 percent.

Companies that depend on external partners such as contractors, independent service providers and marketplace

> ## "Proper onboarding isn't done to prevent churn; it's done to ensure the customer achieves their desired outcome. Retention comes from that."

sellers understand they have a similar cost exposure — and a similar opportunity to capture more value out of these relationships.

As customer success consultant and SaaS expert **Lincoln Murphy says in the context of customers**, "Proper onboarding isn't done to prevent churn; it's done to ensure the customer achieves their desired outcome. Retention comes from that."

The same goes for relationships with your workforce and partners.

How the User Lifecycle Explains Workforce Onboarding

Employees, partners and users typically go through a common journey or lifecycle with your company:

- **Awareness**: "I like this company and want to know more about it."
- **Application**: "This is an organization I can see myself working for, so I'll fill out an application or sign up."
- **Activation**: "I've applied and am now being vetted. Great! Once I'm approved I can start the onboarding process and learn more about my new role."
- **First exchange**: "I've completed my first assignment. The training during onboarding really helped."
- **Growth and retention**: "Now that I'm feeling more confident in my job, I want to do more and grow."
- **Remediation**: "How can I improve? Is there more training I can take advantage of?"
- **Mentorship**: "Now that I feel confident in my abilities, I want to help others succeed here."

All those steps are important in your relationships with your workforce, but the most crucial to onboarding are activation and first exchange. These are the points where your company starts to have direct contact with someone who is interested in working with you.

Therefore, this is where your time to value equation (TtV) comes together. A confident employee, service provider or seller will take on more responsibilities or work assignments or complete more sales and deepen the partnership, thereby strengthening their contributions to your bottom line. **Activation and first exchange** are your foundation for mutual long-term success.

What Makes a Great Onboarding Process?

Successful companies focus relentlessly on designing a smooth and clearly marked journey to joining the team, leaving no roadblocks to getting started.

Several features come together to create a great onboarding system, but three stand out as critical: creation of a robust

User Lifecycle

Awareness   Application   Activation   First Exchange   Growth & Retention   Remediation   Mentorship
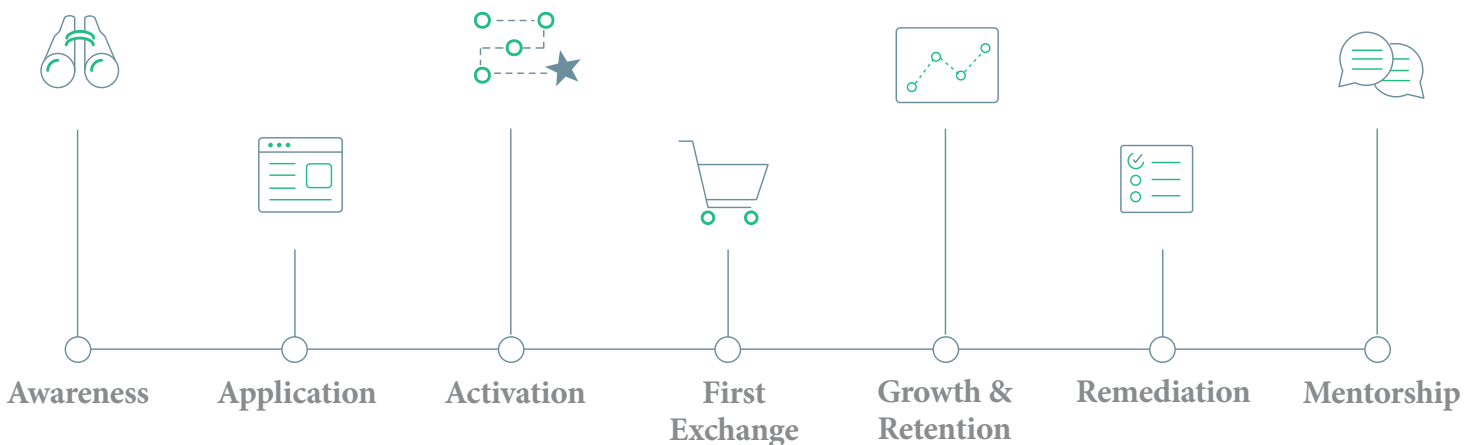
training program fully integrated within the onboarding workflow, **automation** that ensures efficient onboarding, and **data/document collection** of the right information.

Training

Integrating high-quality instruction with onboarding means partners will have the knowledge and confidence to complete their first assignment quickly. Consider these uses and benefits of embedding training:

Helps prospects complete the onboarding faster.

If during onboarding, a prospect needs instruction on how to perform a specific task like uploading a needed document or photo, they can pull up a short how-to video.

Customizes training.

Users are able to select modules most applicable to their needs or concerns as they onboard. They can cherry pick content relevant to their purpose, such as how your solution solves their specific business challenge, or how it helps them earn more.

Makes training easily accessible.

As your new hires flow through the onboarding steps, they can immediately access learning content without waiting for a trainer to visit or wading through libraries of PDFs. Naturally, today's training isn't just online but also must be mobile optimized to reach employees and contractors when and where they need it.

Demonstrates your value.

Training modules at the onboarding stage can underscore the benefits of joining your platform. Brief tutorials can show how your solution works and how it benefits your employees. You can also mix in case studies of others who have succeeded with your company.

Automation

Automated onboarding enables prospects to complete the process on their own without resources to manage each step. You can concentrate your people where they are needed most -- resolving prospects' legitimate concerns and questions rather than overseeing rote steps, such as manually filling out a form.

> **"Automated onboarding enables prospects to complete the process on their own without resources to manage each step."**

Recently, Northpass partnered with Postmates, an online, on-demand food delivery service. Postmates wanted to speed up the onboarding process for its couriers, which at that time stretched to over a month. With condensed onboarding, Postmates and new couriers would be able to generate revenue together faster.

After Postmates implemented Northpass' digital solution, onboarding for their new couriers was reduced to just a couple of days. This included collecting all the required documents, which meant these new partners could start booking assignments immediately.

Another customer, Everlaw, an online litigation tool for attorneys, integrated Northpass. As a result, **Everlaw's User Advocate, Mondee Lu said**, "We reduced the onboarding time for both new employees and partner organizations, while ensuring that they are well trained on our product."

Data Collection

Effective data collection enables the organization to pre-qualify a

prospect as someone able to get value from the partnership. You may want information from your new hire like:

- Past experience in a similar role.
- Confirmation that they uploaded required documents (licenses, ID, background checks) or signed contracts.
- Direct deposit information for payment.
- The employee's purpose: what they hope to achieve by joining the team.

Gathering this information also produces actionable insight. The onboarding data is a valuable resource you can share with other
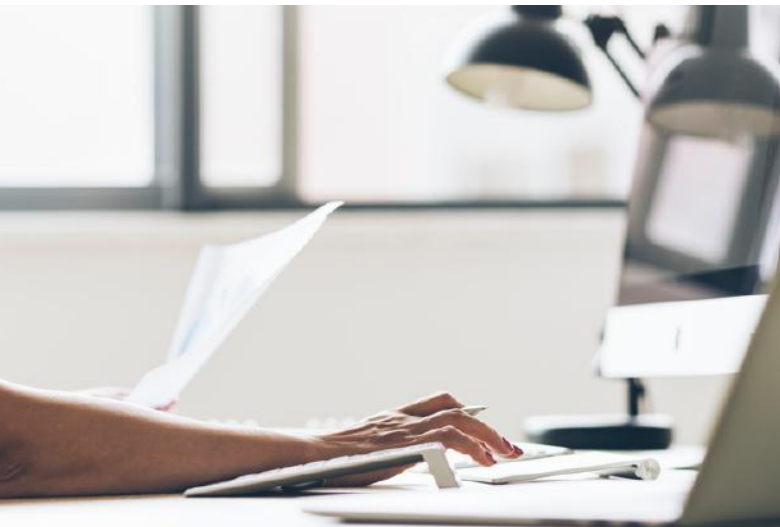
departments, such as product development, design, business development and sales.

Five Steps to Great Onboarding Content

Define

What does your new workforce need to know? This varies depending upon the user persona. Consider the business goals, training goals and learning objectives for a specific use case.

Some may need technical instruction on your platform, while others may need guidance on working with customers.

Outline

Determine the major points required to convey the learning to the user. This serves as your content roadmap. Brainstorm course ideas with your team and collect all relevant materials. Then start writing! Turn the ideas into useable content. Determine what methods — including written and multimedia — you'll use.

Build

You've decided what to include in the learning modules, such as videos, screencasts, slide decks or quizzes. Now it's time to design and build them.

Engage

Consider your specific use case and use the most effective way to deliver the content. Some employees may prefer videos, while others learn best by reading instructions. Have all formats available. The content itself and methods used should capture and retain the user's interest.

Measure

Chart the percentage of prospects that complete onboarding — and how many fall off. Take a deep dive into the statistics and perfect the content that pushes prospects to the finish line and enables them to do their jobs better. Those numbers are reflected in higher earnings. Solicit feedback from your users to continue improving your training.

The Airbnb Way

Airbnb provides a great example of how to align training and onboarding with engaging and relevant learning resources. The home-share company's "Hosting Toolkits" offer hosts video

lessons about greeting guests and other advice on how to succeed.

Airbnb makes the toolkits available to prospects during onboarding, which serves to address many concerns applicants have about joining the platform and to establish a basis for partnership.

Use a Content Matrix to Support Your Onboarding

Moving prospects along the funnel from interested parties into applicants, and ultimately into longstanding partners, hinges on embedding content at each touchpoint that connects with the mindset and needs of the prospect.

Content Matrix Steps

Awareness: This top of funnel stage drums up awareness of your company. Helpful blogs and social media campaigns catch the eyes of would-be providers, employees, sellers and other partners.

Interest: Now prospects want to know more about your company. Typically, prospects at this point in the funnel are in a "What's in it for me?" mindset. So the content must clearly explain and document your value proposition for them.

Application: An automated application and sign-up process is critical, but content still plays a role in this step. For example, if a large percentage of prospects drop off before completing the application, the issue can be remedied with brief how-to videos or training modules to guide the prospect through sign-up.

Retention: Once someone is part of the team and working with you, they may still have questions and concerns. More in-depth and specific training content helps your workforce understand

how to use your platform to its highest potential.

Advocacy: The ultimate goal of the funnel is to convert partners into brand ambassadors for your product or platform. Ask long-standing partners to become active advocates by sharing their knowledge about how to succeed on your platform. In addition to reinforcing your value proposition, this content also serves as an instructional tool, giving potential users and partners more

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insight on how to extract the maximum value from your product or service.

Tend to the Brand Values

Onboarding and training must emphasize your organization's brand values. Training empowers your employees to create a top-notch experience for customers.

When developing onboarding and training, remember:

- Employees are the face of your brand.
- Success for the company depends on the success of your workforce.
- Your workforce may have choices, so in many cases your training is voluntary. You have to make it compelling and worthwhile.

– Training directly impacts business outcomes. Make sure training is aligned with your overall goals.

Characteristics of the Best Onboarding and Training Formats

Whether for employees or channel partners, training and onboarding must be seamlessly embedded within your platform. Both functions are integral parts of the operations of your organization, not separate silos.
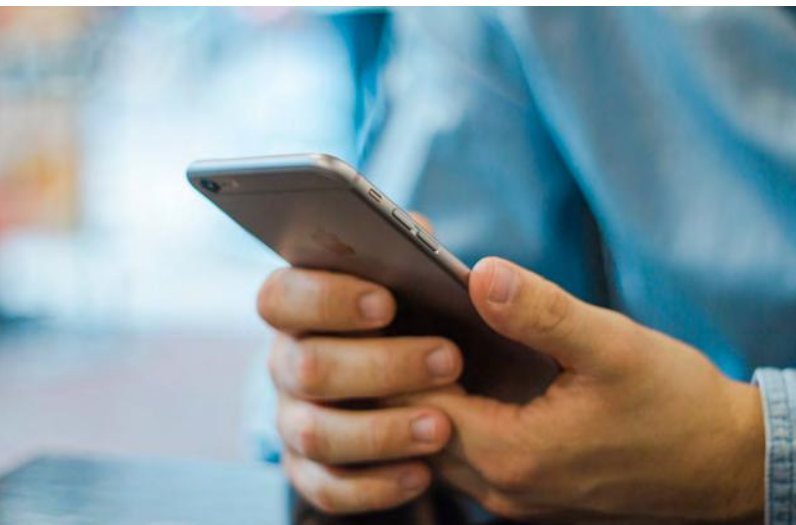
Yet onboarding and training in the emerging SaaS-based economy demand additional characteristics.

Onboarding at the Time of Awareness

Prospects should be able to easily access the onboarding platform as they research your organization online. Prominently display where that training can be found on your website, so it's just a click away.

Training at the Point of Need

Instruction must be embedded intuitively so employees can

dive into it at the point they need it. A screencast about best practices, for example, should be available at a strategic moment, not tucked away in an appendix; a tiptool about completing a given form should be clearly accessible on that form's page.

Anytime, Anywhere Mobile Access

For your workers to be able to log into learning 24/7 in the field, mobile-supported instruction is required. Today's professionals won't tolerate anything less.

Social Learning

Offer new workers an easy gateway to internal experts and support staff when they have questions or hit a roadblock.

Measuring the Success of Onboarding and Training

Several metrics can demonstrate the effectiveness of your onboarding program:

– Increased conversion of site visitors to completed applications.
– Shortened timeframe between completed application and first exchange.
– Higher employee earnings, productivity or output.
– More positive reviews from customers.
– Reduced number of support tickets.
– Higher lifetime value.

A quality onboarding program will have the necessary tools to gather and analyze these metrics integrated into it, and will show how your training is moving the needle.

For example, if your conversion rate stood at 10 percent before training was incorporated into the onboarding system but is

20 percent after, you know that training was a prime factor in improving the conversion rate.

And if the needle isn't moving, you have some insight into where you can improve. Your analytics can answer questions like:

- At what point are users dropping off?
- Is the onboarding process taking too long?
- Is there too long a lag between application and first exchange?
- Where can improved training content be inserted to help reduce churn and speed up TtV?

The ROI of Onboarding

Measurable success in your onboarding and training has direct and indirect impact on your bottom line by reducing costs and increasing revenue.

Immediate productivity: Your workforce knows how to perform the first exchange right after they onboard.

Operational efficiencies: Better onboarding and training enables employees and partners to start taking assignments or making sales more successfully.

Reduced support expenses: Fewer dollars are spent on costly support tickets since your workforce has already been well vetted and has the guidance they need to succeed.

Higher earnings: As more of your workforce is onboarded to your platform and beginning to earn, you are effectively pulling three different revenue growth levers: more workers, working with you for longer, doing a better job.

What Makes a Great Onboarding Solution?

Utilizing an onboarding solution clearly streamlines the workforce hiring process, but there are other advantages as well. It permits your organization to focus on its core operations, while also providing partners that are well-vetted and trained from day one.

Onboarding that delivers a high ROI should include several critical features:

- **Distributed**: Pick a solution able to function across multiple geographies.
- **Integrated**: It plugs into and plays well with your platform.
- **Scalable**: The solution grows as your business grows and attracts more partners.
- **Adaptable**: It delivers in all formats, whether video, text, interactive testing, animation, social learning or gamification.
- **Flexible**: The solution offers the capability to add new content and revise existing content.

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And the most important element of an onboarding platform?

In a word — speed.

Your onboarding should be streamlined and frictionless for the

user, yet able to gather all relevant data and documents in a timely fashion.

Speedier onboarding results in workers who are able to perform their first assignment sooner, while serving as excellent representatives of your brand.

Request a demo to learn how Northpass' modern training platform can help your business streamline your onboarding operations.

Follow Northpass on Twitter **@Northpass**

Speedier onboarding directs revenue into your bottom line, as well as that of your workers, without any unnecessary delay.

Speedier onboarding turns employees, contractors and sellers into long-time partners by enabling their success and turning them into ambassadors and advocates.