

Avionté CONNECT

Registration Open



August 4-6, 2025
[Hilton Minneapolis](#)

Scan for FREE Registration





WELCOME



Automated Onboarding: Transform Your Talent Experience





About Me:

- Misha St.Clair
- Product Trainer
- 15+ years in technical training
- Trivia host



Onboarding Challenges

You're excited to place talent, and they are motivated to start working, so what's the problem here?



Complexity

May lead candidates to drop out between placement and starting



Time

40% of recruiters spend over 3 hours onboarding each new hire



Pressure

Placements need to happen quickly, regardless of volume

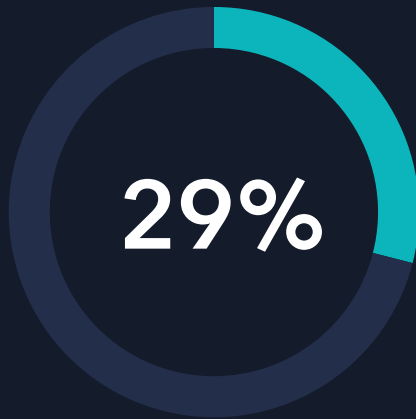


Compliance

Errors with things like I-9 and tax documents can happen in this system



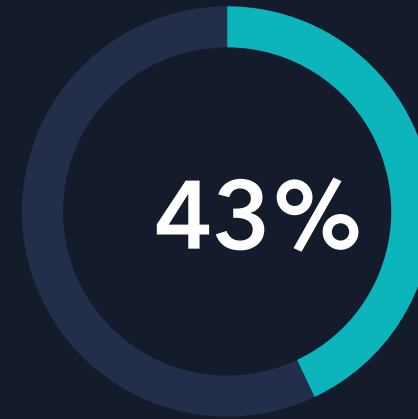
Temporary Workers' Onboarding Experience



Of temporary workers
feel ready for their job
after onboarding



Gallup, 2021



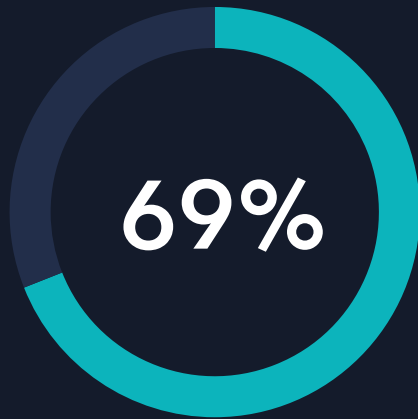
Wait more than a week
to have the basic tools
to do their job



Vlerick-Talmundo, 2019



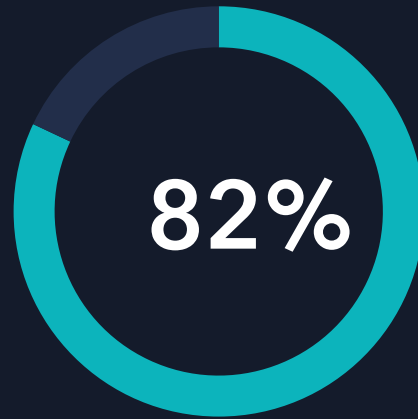
Benefits of Improved Onboarding



Likely to stay for over
three years



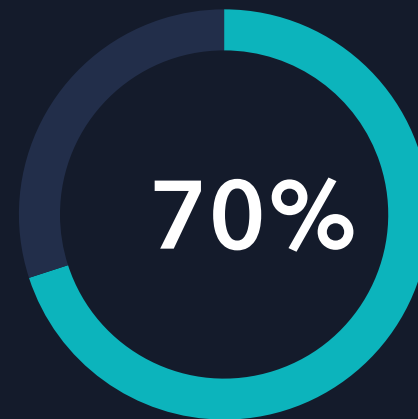
SHRM, 2017



Improvement in new
hire retention



Brandon Hall Group, 2019



Increase in
productivity



Brandon Hall Group, 2019





Why are we here?

The staffing industry moves fast. 2.5 million temp workers onboard every week, often under tight deadlines and strict compliance demands. Automated onboarding offers a scalable way to stay compliant, accelerate hiring and give candidates a smoother experience from day one.



BY THE END OF THE SESSION

You'll be ready to:

- Transform your onboarding process
- Create automated workflows
- Save time, reduce errors and provide a better experience





Important Note About Automated Onboarding






To determine whether *your* current package includes Automated Onboarding or available integrations:

1. Contact your Account Manager directly
2. Don't know who your Account Manager is? Open a support ticket at support@avionte.com








Standard vs. Automated Onboarding

Standard Onboarding

-  Set hands-on process
-  Manual task tracking and reminders
-  Largely desktop-based experience
-  Basic form completion
-  Consumes recruiter time

Automated Onboarding

-  Configurable workflows
-  Automated tasks and notifications
-  Offers a mobile experience
-  Easy-to-navigate compliance forms
-  Frees up hours for better uses



Math Time!



Math Time!

Hours to onboard \times Cost per recruiter hour \times Hiring volume

= Savings from Automation



Savings from Automation

$$3 \times \$30 = \$90$$

Hours to onboard

Cost per recruiter hour

Savings per new hire



Savings from Automation

$$\text{\$90} \times 50 =$$

Savings per new hire

New hires each month

\\$4,500

Monthly savings



Savings from Automation

$\$4,500 \times 12 =$

Monthly savings

Months in a year

$\$54,000$

Annual savings



Savings from Automation

$$150 \times 12 =$$

Hours each month

Months in a year

1,800

Hours each year



Onboarding Workflows



Example Workflow

Stage 1: Personal Information

- Fill out Personal Info form
- Upload a copy of identification

Stage 2: Employment Details

- Read and sign the employment contract
- Fill out tax forms

Stage 3: Company Policies

- Read and acknowledge the employee handbook
- Complete the company's code of conduct training



Stage 4: Setup

- Set up direct deposit for payroll
- Choose health insurance and other benefits

Stage 5: Orientation

- Schedule orientation meeting with HR
- Complete department-specific training



Voices

Companies

Documents

Back Office

Analyze

QuickPlace

Automation

Interviews

Genai Studio

Calendar

Workflows

Automation Rules



Back To Workflows

General Onboarding

EnabledDisabled

Workflow Description

This is a general purpose onboarding workflow.

Effective Date

mm/dd/yyyy

Workflow Office Access

Nothing selected

Workflows are reusable sets of Onboarding Tasks



Stage 1: Verify Personal Information Stage

It is recommended that this stage never be disabled, as contact and other personal information verified in this stage is used to speed up the onboarding process by auto-filling information in included forms.

☐ Don't require this stage.

☰ Employment Details

Stage Settings

- ☒ Tasks must be completed in order
- ☐ Send task reminders

Task	Due Date	Task Instructions
☰ Equal Employment Opportunity	3 days after assignment	
Us		
☰ Symmetry	3 days after assignment	Please answer the questions presented to ensure the appropriate tax forms are completed.
FEDERAL - W-4 - Employee's Withholding Certificate		

+ Add Task

Workflows are made of Stages, which contain Tasks



Employee Setup

Stage Settings

☐ Tasks must be completed in order

☐ Send task reminders

Task	Due Date	Task Instructions
<div>Direct Deposit</div>	<div>1</div> days after assignment	Please add ONE direct deposit account and verify the information is correct.

⊕ Add Task

Add Stage

Cancel

Save

Stages and Tasks can be dependent upon each other



Workflow Tips

- Sequence tasks logically and take advantage of prefilled information
- Provide clear, action-oriented instructions
- Consider making specialized workflows for different locations or industries



Automating Workflows



Companies

Documents

Back Office

Analyze

QuickPlace

Automation

s

Genai Studio

Calendar

Workflows

Automation Rules



[Back To Automation Rules](#)

Basic Automation Configuration

Different events can be monitored and automated. Start by choosing the automation category, then the event.

Enabled

Disabled

Automation Name

Connecticut Onboarding

Automation Type

Onboarding

Event

Talent Status

IS

Ready for Onboarding

Events are conditions to start an Automation



Trigger Conditions

Actions will only trigger if the below conditions are true for the selected trigger

Condition: 1

Talent Address	IS	United States of America	Connecticut	✕
----------------	----	--------------------------	-------------	---

[+ Add Condition](#)

Trigger Conditions optionally add specificity to the trigger Event



Actions

Actions will only trigger if the conditions above are true for the selected trigger

Send Workflow

> General Onboarding

Completion Action

When Workflow is Completed



Change Talent Status

TO



Onboarding Complete

Cancel

Save

Actions send the specified Workflow



Actions

Actions will only trigger if the conditions above are true for the selected trigger

Send Workflow

> General Onboarding

Completion Action

When Workflow is Completed

> Change Talent Status

TO

Onboarding Complete

Cancel

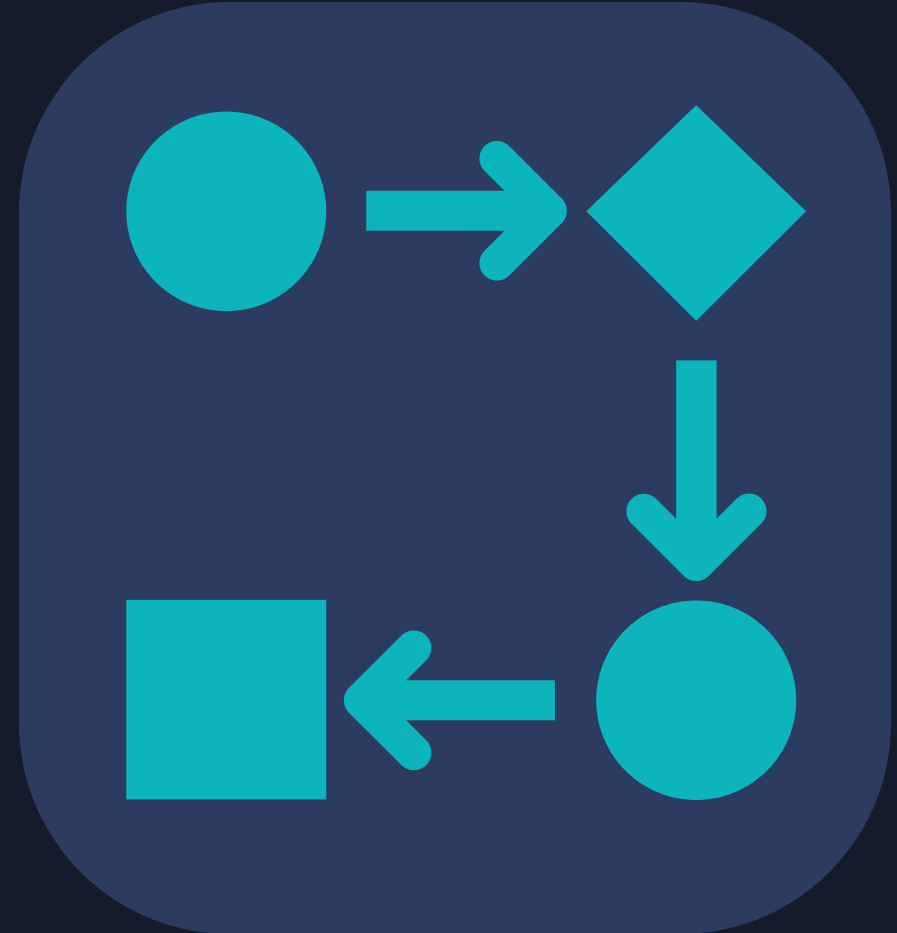
Save

Completion Action ends the Automation and moves Event condition forward



Automation Tips

- Use **Talent Status** changes as trigger events
- Add **Conditions** to limit reach to people in a particular location or Home Office
- Configure talent statuses to show a clear journey
- Automations can be chained, with one's completion triggering the next
- Watch out for conflicting rules



Talent Engagement

- Automating Onboarding assigns the workflows, but Talent Engagement sends the messages
- Trigger Events include Onboarding Due or Onboarding Assigned
- Messages can be scheduled to remind the talent on a set interval
- Full Talent Engagement webinar available on Avionté Knowledge Base



Tracking Tasks





Active Job Monitor - Max Evert HCM

Job	Days Open	Days Inactive	Nominate	Pipeline	Applied
Business Development Avionte MJB	2	0	0	0	0
Asteroid Miner Avionte MJB	2	0	0	0	0
Asteroid Miner Avionte MJB	11	0	0	0	2 <small>NEW</small>
Asteroid Miner Avionte MJB	7	0	0	0	0
Aeronautics and Space Avionte MJB	7	0	0	0	0
Rocket Scientist Avionte MJB	21	0	0	0	0
Agriculture Avionte MJB	22	0	0	0	0
Rocket Scientist					

Onboarding Tasks

- 4 Sent Tasks
- 0 Action Required
- 2 Completed Tasks
- 0 Overdue Tasks

E-Verify Case Management

0 Draft

Newest 50 Talent

Name	Mobile Phone	Created Date
Shadae Thorpe elleventyseven44@gmail.com	4126160759	3/14/24

Past Events

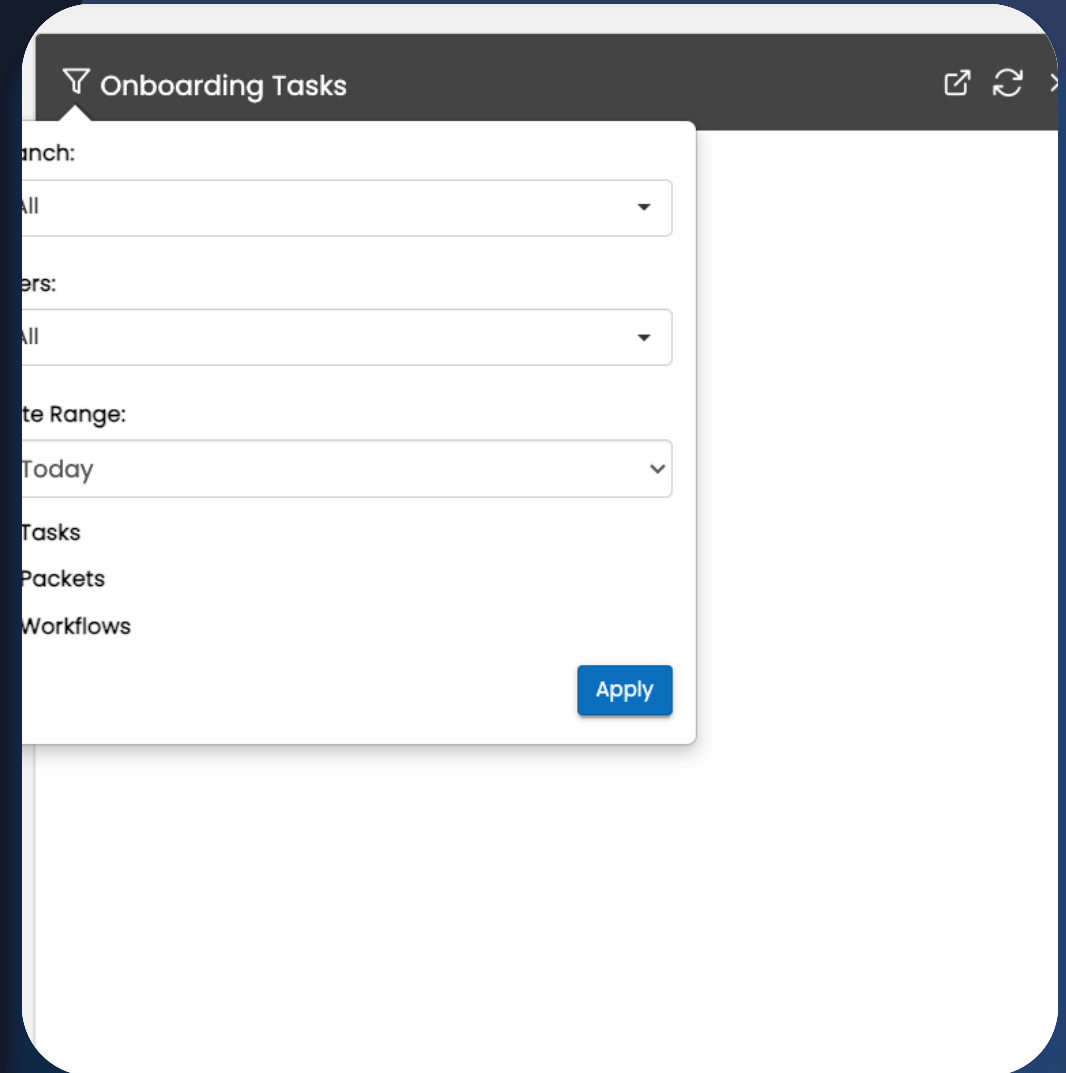
Company	Manager	Talent	Stage
SkySail Adventures Hot Air Balloon Pilot	Bob Hoover	Bentley Dahms	Approved for work 3/14/24 2:38 PM



AUTOMATED ONBOARDING

Onboarding Tasks Widget

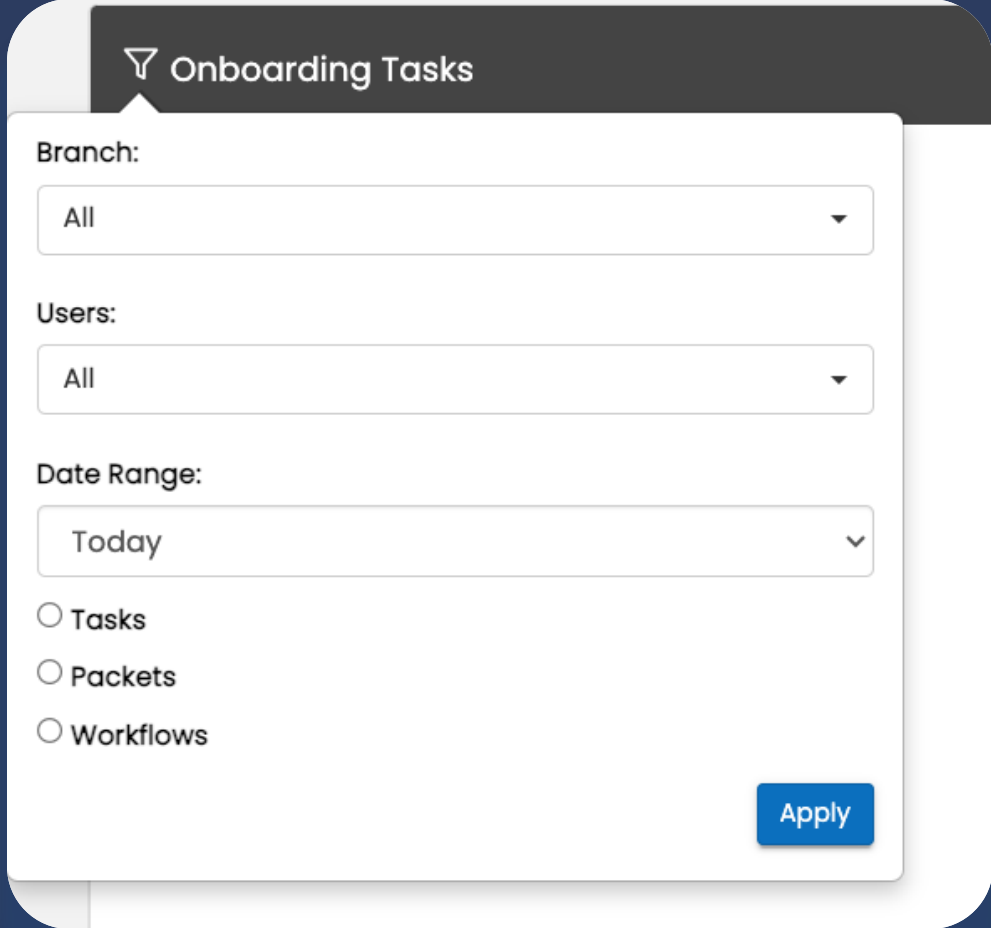
- Access and manage onboarding tasks with a comprehensive view of the entire process
- Monitor categorized results like **Sent Tasks**, **Action Required items**, **Completed Tasks** and **Overdue Tasks**
- **Filter** results for quick and relevant assessment of onboarding progress



AUTOMATED ONBOARDING

Onboarding Tasks Widget

- Access and manage onboarding tasks with a comprehensive view of the entire process
- Monitor categorized results like **Sent Tasks**, **Action Required items**, **Completed Tasks** and **Overdue Tasks**
- **Filter** results for quick and relevant assessment of onboarding progress



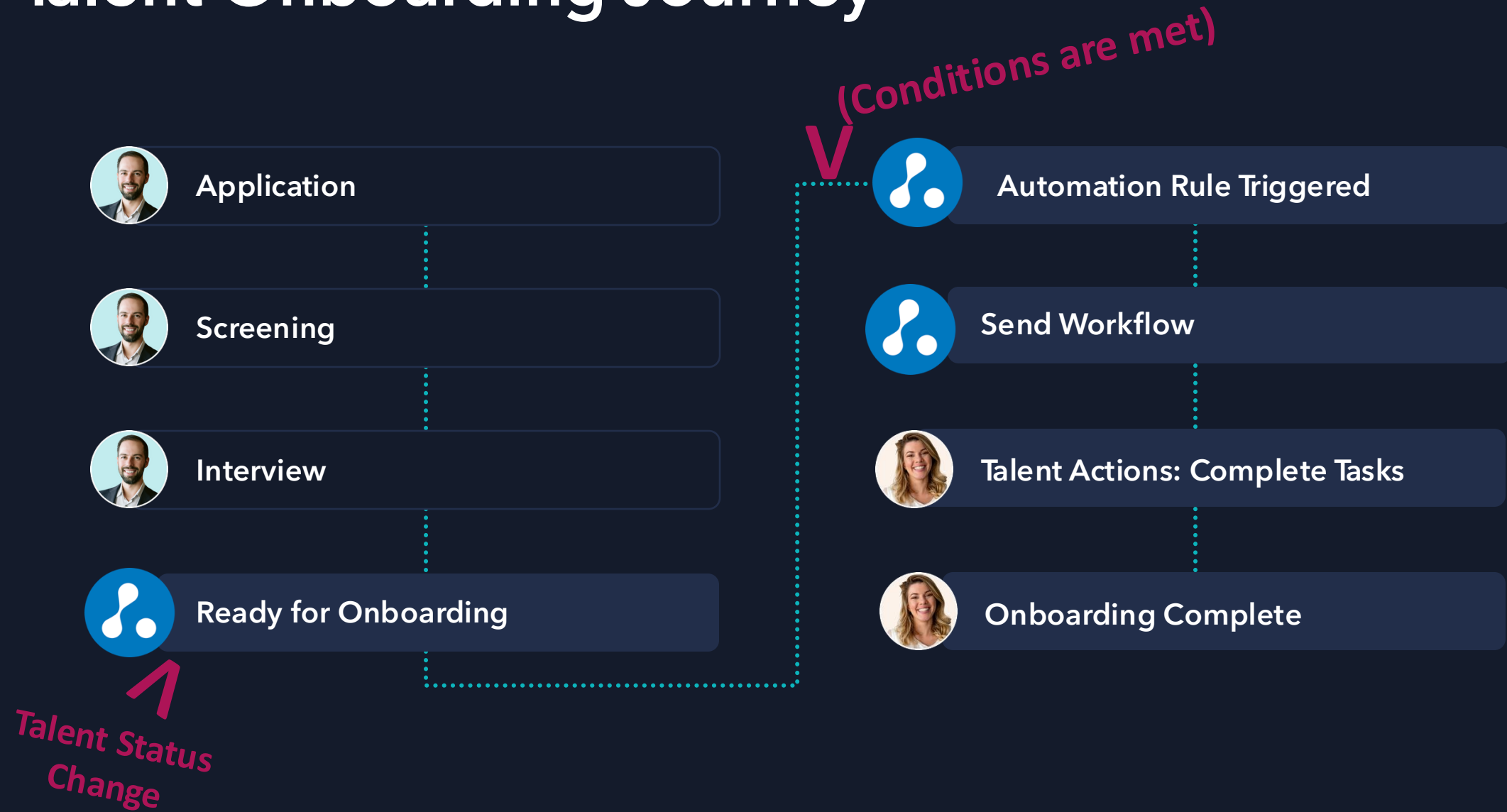
The image shows a screenshot of a web application interface for 'Onboarding Tasks'. At the top, there is a dark header bar with a funnel icon and the text 'Onboarding Tasks'. Below this, a white modal or overlay contains filter options. The 'Branch:' section has a dropdown menu currently set to 'All'. The 'Users:' section also has a dropdown menu set to 'All'. The 'Date Range:' section has a dropdown menu set to 'Today'. Below these, there are three radio button options: 'Tasks' (which is selected), 'Packets', and 'Workflows'. A blue 'Apply' button is located at the bottom right of the filter overlay.



Talent Experience

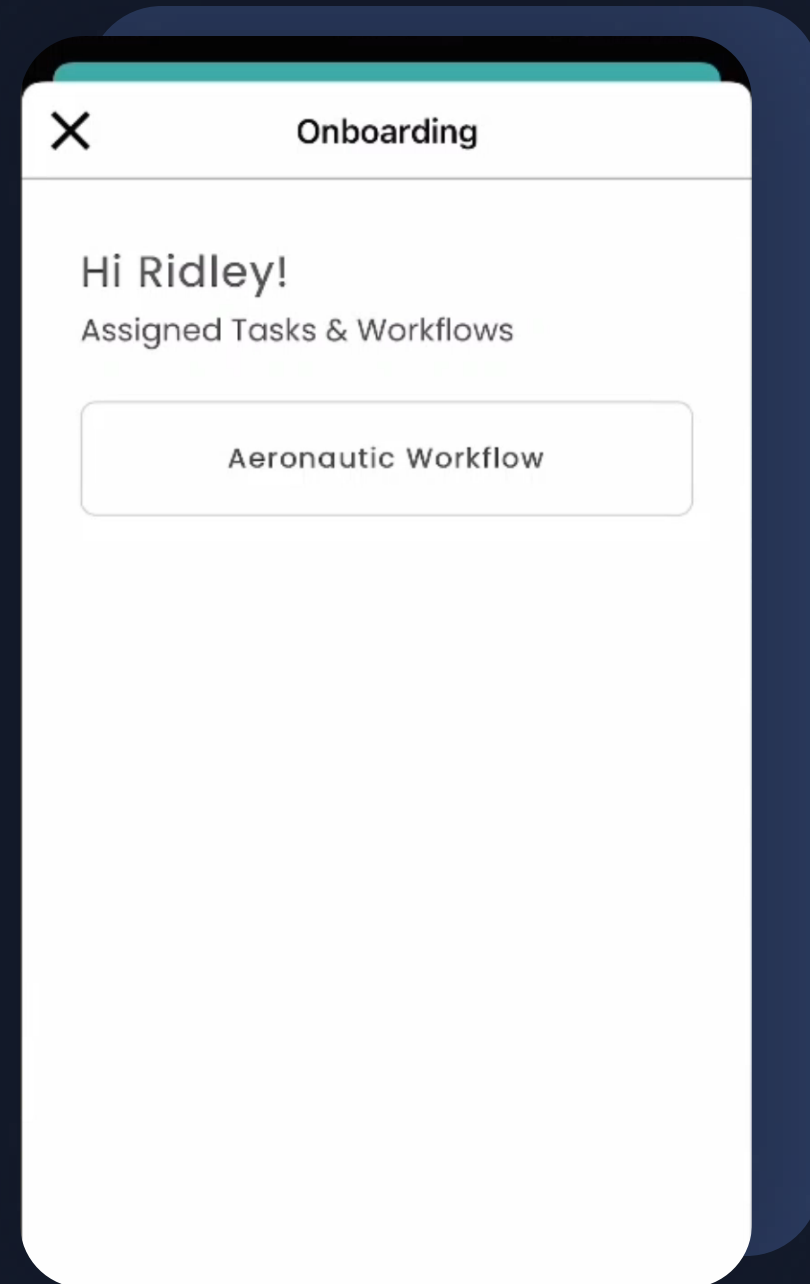


Talent Onboarding Journey



Talent Experience

- Mobile-friendly format lets them handle tasks on their device of choice
- Easily navigated forms with prefilled information expedite completion
- Partial progress is saved so tasks can be completed in multiple sittings
- Explore the talent's experience yourself to better understand challenges and provide support when needed



Getting Started



Change Management

A practical roadmap for implementing Automated Onboarding



Setup and First Steps

- Configure basic workflows
- Test with small group
- Gather initial feedback

30 DAYS



Expand Approach

- Gradual volume increase
- Train full team

30-60 DAYS



Continuous Improvement

- Analyze performance data
- Implement changes
- Plan next phase

60-90 DAYS



Who to involve?

Be sure to include the right people early, to get all the necessary input and feedback along the way to ensure successful implementation



Compliance Specialist

Someone who understands your specific regulatory requirements.



Recruiters

Provide front-line feedback on user experience.



Operations Leaders

Who can help quantify performance improvement



Common Concerns

The Fear


- "Will this replace me?"
Fear of job elimination
- "I'll lose the personal touch"
Worry about candidate relationships
- "This is more work, not less"
Setup and maintenance concerns
- "Computers are hard!"
Technology anxiety

The Reality

- **People become more valuable**
Focus on strategy, not paperwork
- **Deeper relationships**
Make time for more meaningful conversations
- **15+ hours back per week**
Time for more impactful activities
- **Comprehensive training resources**
Step-by-step support provided



Resource for Training Your Team

 **AVIONTÉ UNIVERSITY**

HomeIncluded ContentCourse CatalogLive TrainingCommunity ForumSupport


Search

Sign In

Automated Onboarding: Setting Talent Up for Success

This guide walks you through the Automated Onboarding process, which begins after talent successfully completes initial pre-screening and enters the "Ready to Work" pool. By enabling talent to quickly complete required tasks online or via mobile app while eliminating time-consuming manual processing for recruiters through powerful workflow automation, you'll streamline this critical transition and create a more efficient onboarding experience.


[Watch Tutorial Video](#)



For Admins


What you do here will be valuable to bring to your internal team so they understand how to use the triggers you create!

While this setup is for admins, it is important that recruiters are aware of the automation to expect the behavior.



Workflow Automation

Streamline onboarding through automated workflows that eliminate manual processes and ensure consistency.



Note: [Click here](#) if you are looking for information on Manual Onboarding.

Resource for Training Your Team

☐ Create New Questionnaire: Navigate to Account & Settings > Utilities > Talent Questionnaire.

☐ Design Question Format: Add a comprehensive description explaining the questionnaire's purpose and completion time. Determine whether questions are required or optional.

☐ Enhance with Multimedia: Use merge fields to personalize the questionnaire with talent information. Incorporate photos, videos, or documents to provide additional context for complex questions.

💡 Best Practices

- ▶ Keep questionnaires focused and concise to improve completion rates
- ▶ Use a mix of question types to maintain talent engagement throughout the form
- ▶ Consider using point values and correct answer options for skills assessment questionnaires

📖 Further Reading:

[24/7 Onboarding Overview](#)

[Create New Workflows with Onboarding Tasks \(24/7\)](#)

[Configuring Talent Onboarding Tasks](#)

[Create New Automation Triggers and Actions](#)

[Create New Talent Questionnaires \(v. 2\)](#)



Measuring Your Success



Measuring Success and ROI

1

Track Key Metrics

Recruiter time spent on onboarding, Time to complete onboarding

2

Onboarding Compliance Report

Provides an overview of pending and completed onboarding tasks and placement status

3

24/7 Workflow Report

Provides information regarding onboarding workflow

4

Long-Term Value

Focus on retention and talent satisfaction boosts



A decorative border of colored dots (pink, teal, and blue) surrounds the central text.

Knowledge Check



How many temporary workers feel ready
for their job after onboarding?

29%

42%

87%

All of them



What is the recommended trigger event for starting an automation rule?

Pipelining Talent

Changing Talent
Status

Nominating Talent

Time or date



True or false: Automated Onboarding tasks must be completed on a mobile device

True

False



A decorative border of colored dots (pink, teal, and blue) surrounds the central text. The dots are arranged in a rectangular frame with varying colors at each position.

Thanks for playing!



Next Steps



Resources

Scan the code to access our
Knowledge Base Article

Recording of this session
will be emailed



Next Webinar

Strategic Cash Flow Management:
Advanced Avionté
SmartFund® Techniques

June 25th, 2025 at 1:00 CT



Webinar Q&A

- **Question:** Are the status choices/results of triggers hard coded or can we use our pre-existing status levels?
- **Answer:** The Status options for configuration will pull from your system's list of Talent status or your system's Nomination/Pipeline stages.
- **Question:** Is this separate from PIXEL?
- **Answer:** Yes, this is. However, you can use elements of PIXEL to help with reminders for completing
- automated onboarding tasks.



Webinar Q&A

- **Question:** I don't see the option to set up automation from the main menu. I have Admin access; how can I turn this on?
- **Answer:** If you do not see the user permission in your system called 'Onboarding Automation Admin' or '24/7 ONBOARDING Task Workflow Admin', then you want to contact your Account Manager. Otherwise, if you have those user permissions enabled, you should be able to see the Automation tab upon applying the permission and logging out and back in again



Webinar Q&A

- **Question:** If a task in a workflow needs to be resent, causing the trigger not to complete. Would an additional condition need to be added for the automation to work?
- **Answer:** If you send a workflow and the Talent needs to recomplete a specific task in that workflow after it was sent, your best bet may be to send that task individually through manual means. If you have a specific scenario you're concerned about, you can check with Support or your Account Management team to talk through that specific scenario!



Webinar Q&A

- **Question:** What is the cost?
- **Answer:** The best way to find out pricing and additional information about adding Automated Onboarding is to reach out to your Account Manager. If you need assistance identifying who your Account Manager is, you can open a support ticket by emailing support@avionte.com.



Rate this session!

