

Build an enterprise onboarding service

What's in this Success Playbook

This Success Playbook will teach you how to prepare for and start building an enterprise onboarding service using ServiceNow®. You'll learn how to:

- Define and scope an onboarding service that's aligned to your business objectives
- Develop a repeatable blueprint for designing onboarding activities
- Provide the right testing, training, and promotion to drive adoption of your service
- Evaluate your initial phase and look for improvement opportunities as you extend your service

Key takeaways

The most important things to know

Enterprise onboarding can be one of the most complex services you implement—but you can use ServiceNow to cut through complexity. To reduce complexity, start by creating a clear vision of your objectives, scope, and stakeholders. This includes defining an initial phase that achieves quick wins, using the ServiceNow Enterprise Onboarding Maturity Model for guidance.

Implementing onboarding with a phased approach achieves value faster and you'll develop insights that will help you scale.

The payoff of getting this right

You'll kickstart implementation of your onboarding service by building a repeatable blueprint that you can scale across the enterprise. Implementing an onboarding service in a correct, repeatable way will help you achieve business objectives such as:

- Improving the candidate-to-employee experience
- Increasing new hire productivity and retention
- Improving the efficiency and transparency of your onboarding process

What you need to get started

You'll need inputs from your executive sponsor, key IT and HR business partners, and other key stakeholders (such as your onboarding and facilities support teams) to help you identify the business objectives and scope of your onboarding service. You'll also need relevant artifacts from your current onboarding process so that you can identify opportunities to digitize and improve workflows.

When you should start this activity

Depending on the size of your organization, your initial phase can take two to three months to implement. Look for planning windows where your organization has a smaller volume of new hires so you can have the attention of your onboarding support team (that is, the team dedicated to new hire onboarding). Subsequent phases of your onboarding service roadmap may take even less time for each phase as you incorporate the lessons learned and scale your blueprint.

Playbook overview

ServiceNow recommends four steps to build an enterprise onboarding service, using the capabilities provided by ServiceNow.

	Step	Outcome
Start At the beginning, you'll build your initial or foundational capability. This includes setting up initial frameworks, defining roles, and clarifying your objectives.	Step 1 – Define the onboarding service	You've planned and prepared for building the onboarding service through defined, clear, measurable business objectives, service definition, and scope that you can communicate to key stakeholders. You've also identified the teams and individuals who will help you effectively deliver the service.
	Step 2 – Design the onboarding service	You've mapped existing onboarding processes, grouped them into activities and tasks that can be automated, then designed and re-engineered the most critical onboarding activities to realize your service objectives.
Improve As you improve, you'll take steps that help you reach your objectives and see value fast.	Step 3 – Develop a plan for service adoption	You've developed a plan to drive service adoption that includes testing, training, and promotion.
Optimize Last, you'll refine and expand your capabilities so you can scale as you grow and continuously get more from using ServiceNow.	Step 4 – Scale and extend across the enterprise	You've evaluated the initial phase of your implementation and are ready to apply those learnings to extend your onboarding service roadmap.

Start with Step 1 if you haven't explicitly defined a vision and business objectives for your onboarding service.

If you've already completed your initial phase of implementation and are looking for guidance to extend your service, you may want to start with Step 4 (but look at Steps 2 and 3 to develop a repeatable process for expansion).

Terms and definitions

Activities – Tasks assigned to employees or cases assigned to a process user (like a fulfiller) or agent to complete, like background checks or equipment provisioning

Activity sets – Containers for activities that determine when the activities within the set should be triggered, such as pre-hire, preboarding, day one

Enterprise onboarding – Automation of onboarding and other lifecycle events through digital workflows that manage employee lifecycle events spanning multiple departments

Lifecycle event – Any process in which the employee is the subject of the workflow during a moment that matters, such as onboarding, transfers, or promotions

Minimal Viable Product (MVP) – A product with just enough features to satisfy early adopters, provide rapid time to value, and provide feedback for future product development

Process – A repeatable, structured series of steps designed to accomplish a particular outcome, such as employee onboarding or incident management

Process owner – A person accountable for designing an effective and efficient process, using the right people as well as financial and technical resources, to deliver quality outcomes

Service – A means of delivering value to customers by facilitating outcomes that customers want to achieve without owning costs and risks

Service owner – A person who creates the service lifecycle roadmap and makes sure it aligns with the vision created by the business owner

- The roadmap defines the activities of the service from launch through service improvement and service sunset.

Workflow – Automates multi-step processes that occur between any combination of people and systems to help achieve better business outcomes

See the ServiceNow [product documentation](#) for additional information regarding the setup and configuration of our Enterprise Onboarding and Transitions product.

Step 1 – Define the onboarding service

KEY INSIGHTS

- Regardless of who is leading the implementation, it's critical to build executive sponsorship and support in both HR and IT.
- Use the ServiceNow Onboarding Maturity Model to define short- and long-term objectives.
- Create a one-page definition of your onboarding service to help recruit and gain buy-in from key stakeholders.

Enterprise onboarding can be one of the more complex services you can implement, and it can be easy to get lost in design complexity unless you start with clear definitions. Before you begin building your service, you need to create a clear vision of your objectives, scope, and stakeholders. Clearly defining your enterprise onboarding service sets the North Star for your service's design and implementation—follow that North Star so you can deliver clear business value.

In the following action steps, we share customer's insights—these come from our customers' direct experiences performing these actions.

Action step 1: Identify everyone involved in delivering onboarding activities

Work with your existing onboarding team (or staff handling the onboarding process) to identify all the existing touchpoints for the onboarding process, including:

- Departments
- Stakeholders
- Systems

Identifying these resources will be critical to both mapping out objectives for your onboarding service and creating new digital workflows. Create an initial stakeholder map (using a [RACI](#), or similar framework) to identify ownership responsibilities for the activities involved in onboarding. This should provide the basis for a team and/or working group for the development of the onboarding service. See Table 1 for an example.

Ask your executive sponsor for project management resources to manage activity coordination, including identifying stakeholders and capturing existing onboarding processes.

Department/ function	Responsibility	Step 1: Define	Step 2: Design /imple- ment	Step 3: Adopt service	Step 4: Expand
Executive sponsor	Design/implementation – Approves business objectives, scope, and resourcing for designing and implementing the onboarding service	R	A	A	R
Project sponsor	Design/implementation – Coordinates activities required from stakeholders to design and implement the onboarding service in line with business objectives and requirements	A	A	A	A
IT	Process owner – Ensures hardware/software provisioning and access based on each new hire's role	I	C/I	C/I	C
ServiceNow platform team	Design/implementation – Responsible for maintaining onboarding workflows and data on ServiceNow (Note: Depending on your size or scale you may have a separate or sub administration team responsible.)	C	A	C	C
HR	Process owner – Ensures new hires are assigned to the correct role and level/team/manager, and have access to the appropriate training	I	C/I	C/I	C
Legal/ Compliance /Audit	Design/implementation – Ensures new hire onboarding processes meet statutory and other requirements	I	C/I	C/I	C
Payroll	Process owner – Ensures new hires receive pay deposits, have access to pay records, and are taxed as required	I	C/I	C/I	C
Finance	Process owners – Ensure the new hire headcount is reflected in departmental budgeting	I	C/I	C/I	C
Benefits	Process owner – Ensures new hires have access to benefits information and enrollment	I	C/I	C/I	C
Security	Process owner – Ensures new hires have appropriate access rights to systems and facilities based on roles and responsibilities	I	C/I	C/I	C
Facilities	Process owner – Ensures new hires are allocated appropriate office space and access	I	C/I	C/I	C

User experience (UX)	Design/implementation – Ensures onboarding workflows are intuitive for both new hires and the staff supporting onboarding	C	C	C	I
Implementer (i.e., ServiceNow or certified implementation partner)	Design/implementation – Responsible for implementing enterprise onboarding in ServiceNow in line with business objectives and requirements	I	R	A	C
R – Responsible	The team member who does the work to complete the task				
A – Accountable	The person who delegates work and provides final review on a task or deliverable before it's deemed complete				
C – Consulted	People who provide input on a deliverable based on the impact on their work or their domain of expertise				
I – Informed	People who need to be kept in the loop on project progress				

Table 1: Sample onboarding stakeholder map/RACI

Use the RACI to set expectations for team members. How involved your stakeholder team is will vary based on the scope and phase of your roadmap. For example, if facilities has a use case that will be designed in the initial phase, they will be *consulted*, but if not, they only need to be *informed*. Departments involved should stay informed at all phases and be involved more deeply when there's an activity that touches their department.

EXPERT TIP

To better prepare your project team members, enroll them in the free e-learning course [Lifecycle Events \(Enterprise Onboarding and Transitions\)](#). They also have the option to earn a ServiceNow micro-certification for this course.

INSIGHT 1:

Build cross-functional accountability

As noted earlier, effectively implementing enterprise onboarding requires input from a wide group of process owners. No single team or department “owns” onboarding, which can cause conflict between teams and delay implementation. Given that, you need to vest end-to-end accountability for the service in a clear, single owner with shared support from HR and IT.

Best practice – Obtain support in both HR and IT

Regardless of whether HR or IT is leading the implementation, it's critical to build and support in both departments. Both departments will be involved in building and maintaining the service. It's also critical to gain [executive sponsorship](#) from both the CHRO and CIO to make sure that process owners from both functions are fully engaged.

If the business case for enterprise onboarding originated with HR and you have an executive sponsor from HR, work with that person to gain additional sponsorship and support from an

executive peer in IT. When you have executive sponsorship and/or support from both functions, you'll gain the strategic guidance needed to reach their full cross-functional potential for onboarding. And that guidance is not biased toward one function or another. Having sponsorship in both HR and IT will also help you:

- With cross-functional education and change management
- Expand the range of stakeholders who can actively help deliver the new onboarding service

“Break down onboarding silos. Work with IT, facilities, payroll, and so on to ensure they have visibility and ownership of their onboarding processes.”

– A ServiceNow customer

Blog

Check out the ServiceNow Blog – [Building a Great Employee Experience is a Team Sport](#) to learn how HR and IT worked “better together” at Hitachi Vantara to redesign their new hire onboarding program using ServiceNow.

Best practice – Identify a single service owner for enterprise onboarding

Assign a service owner the responsibility of service planning, development, and improvement of the onboarding service. The service owner should be the clear point of accountability for the quality and cost-effective delivery of the service, and they should be primarily responsible for the service roadmap and its strategic direction. You might consider someone in IT, HR, or shared services based on your objectives and organizational context.

The service owner should be a dedicated FTE (if possible) who is identified prior to the project kickoff for implementation. Getting the service owner identified early allows them to get up to speed on the business objectives and context and work effectively with project management resources to coordinate stakeholder inputs for implementation. When you have a single point of service ownership, you can be sure the service is monitored and improved after implementation—and that leads to continually seeing more value.

EXPERT TIP

Consider the time zone the service owner works in. It may be important to accommodate for global companies. If a service owner works PST hours and most hires are in APAC, it may be tough to line up times with stakeholders.

INSIGHT 2:**Understand the objectives behind departmental- and regional-level onboarding requirements**

Identifying and gaining support from stakeholders is a key success factor in launching an enterprise onboarding service. The trouble is that organizations often don't take the time to understand the requirements of different departments and regional locations and their change readiness. For example, the process owner for facilities may be resistant to the new service if they don't feel it addresses specific business objectives. At a department level, process owners may not see the value in changing existing processes. At a regional or country level, requirements for compliance and data privacy (like GDPR) must be considered and implemented correctly in the new service.

Best Practice – Review department- and/or regional-level objectives and metrics for onboarding with individual process owners to surface their priorities and potential objections

As you engage process owners, try to get answers to the following questions:

- Are your existing onboarding processes documented?
- What are your pain points with your current onboarding process?
- Can you provide details on your onboarding process? Are there process steps or requirements that are specific to your department or region?
- Who's performing the work? What are their roles?
- What systems are being used or integrated with? For example, they might be internal and external systems or third-party vendors like payroll, HCM, background checks, benefits, etc.
- What compliance, security, or data privacy requirements are specific to your department or region?
- What metrics are you tracking? What are your targets? One example is a 50% reduction in time to onboard.

Let's say that your organization has differences between departmental and regional processes, but there's not a valid reason why the processes differ. Take a look at these differences to see if they present the opportunity to standardize processes across departments and regions to solve for existing inefficiencies.

Get process owners involved early to ensure you don't miss objectives downstream that could delay the service implementation.

Best practice – Gather metrics associated with your current onboarding processes

Work with process owners to understand your current metrics for existing onboarding processes. An understanding of metrics associated with current onboarding processes will also help measure the success and value of changes made as you implement digital workflows. Identify four to five metrics that help you understand the maturity of your current processes, such as:

- Average cycle time for a specific action, like provisioning office space
- Number of touchpoints—including requests, communications, and approvals—to complete a specific action
- Number of hours required from hiring managers or other staff to complete a specific action
- Number of questions or incidents that come in from employees during the onboarding process
- Average manager satisfaction with the onboarding process
- Average days of delay required between extending an offer and a new hire's earliest allowable start date
- Number of days from start date until employee has all hardware, software, and access required to do their job
- Average retention rates for the first 90 days and first year of employment
- Average cycle time to complete all onboarding activities
- Average new hire satisfaction with onboarding activities

This will help shape business objectives for implementation of your service and provide key points of comparison across departments and/or regions that may be resistant to change.

“Take the time to document and measure the inefficiencies you experienced before the start of the project, because it's super critical to being able to assess what your business outcomes you'll achieve later on.”

– A ServiceNow customer

Action step 2: Define clear, measurable business objectives for an enterprise onboarding service

Working with the stakeholders identified in Step 1, define the business objectives to be achieved through an enterprise onboarding service. Use your understanding of current measures to define the value you can create with workflow automation. Your roadmap can reflect several objectives:

- Enhanced employee experience for your new hires
- Improved task efficiency for HR, IT, and hiring managers
- Improved productivity for both new hires and staff involved in onboarding.

Draft a statement of your objectives, using concrete measures or action statements where possible, to provide a North Star for your efforts. Table 2, below, depicts examples of objectives and related measures of success:

Objectives	Measures of Success
• We will improve our new hires' experiences	<i>X% improvement in new hire satisfaction scores</i>
• We will increase employee retention	<i>X% improvement in retention for new hires in first 90 days and first year</i>
• We will enhance our employer brand	<i>X% improvement in new hires who refer candidates in first year of employment</i>
• We will improve time to productivity	<i>X% improvement in time to productivity (including the time required to access all needed resources)</i>
• We will save service delivery costs	<i>X% reduction in onboarding costs (measured through staff hours required)</i>

Table 2: Enterprise onboarding business objectives

To help guide your definition of business objectives, review your larger business case and roadmap for ServiceNow and your organization's mission, vision, and strategy. Work with your executive sponsors and strategic governance function to ensure that the resources allocated to your implementation are sufficient to realize your business objectives.

Now on Now* – How ServiceNow defines its own business objectives for enterprise onboarding

- Consumerize the employee experience
- Migrate from a custom onboarding solution
- Use out-of-the-box (OOTB) ServiceNow functionality as much as possible
- Eliminate as many manual processes and workarounds as possible

*Now on Now shows you how we, at ServiceNow, use our own solutions to work faster and smarter.

INSIGHT:

Use the ServiceNow Onboarding Maturity Model to define short- and long-term objectives

ServiceNow has created a maturity model to give your organization a point of reference for scoping your objectives based on the experiences of ServiceNow customers. Figure 1 shows the steps of maturity an organization will go through to improve enterprise onboarding.

Onboarding maturity model

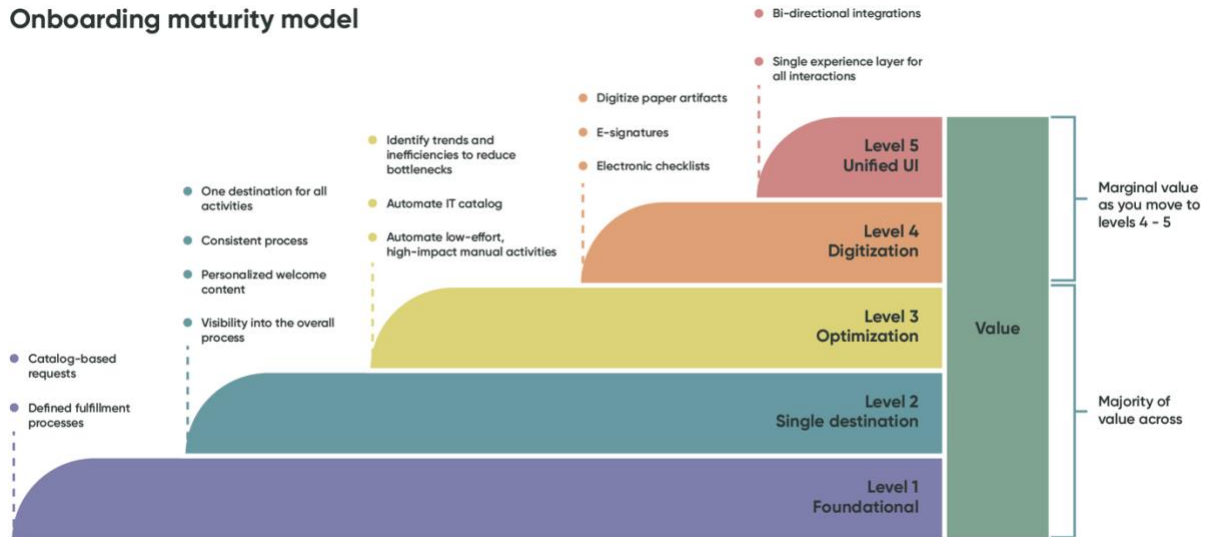


Figure 1: ServiceNow Onboarding Maturity Model

Best practice – Refer to the ServiceNow Onboarding Maturity Model when scoping short- and long-term business objectives

Be careful to avoid over-scoping your initial business objectives when you implement your onboarding service. As with other ServiceNow products, the best approach is to phase your implementation in a way that lets you define both quick wins and long-term value creation.

Table 3 defines the recommended deliverables and objectives for the implementation phases based on your current maturity. Each maturity stage is defined by a reduction of friction in onboarding processes, resulting in increased efficiency and value.

Maturity	A customer at this maturity will...	Achieve outcomes of...	Resulting in value realized by...
Foundational	<ul style="list-style-type: none"> Create IT requests to manually support the fulfillment process for new hires Create HR cases to manually manage activities associated with new hire onboarding Support HR onboarding forms in external systems 	<ul style="list-style-type: none"> Catalog-based requests Defined fulfillment processes 	<ul style="list-style-type: none"> Coordinating onboarding activities
Single destination	<ul style="list-style-type: none"> Create a single starting point for all onboarding activities Provide directional guidance for activities across external systems Incorporate existing cross-departmental enterprise services Provide visibility into the status of onboarding activities for all participants Provide personalized welcome videos and other targeted content 	<ul style="list-style-type: none"> One destination for all activities Consistent process Personalized welcome Visibility into the overall process 	<ul style="list-style-type: none"> Reducing the service delivery effort in complex processes Reducing unproductive time and lost opportunity for revenue generation Improving new hire retention
Optimization	<ul style="list-style-type: none"> Use real-time reporting dashboards Analyze operational metrics and trends to identify process bottlenecks 	<ul style="list-style-type: none"> Identified trends and inefficiencies to reduce bottlenecks Automated IT catalog Automated, low-effort, high impact manual activities (e.g., background checks or new hire documentation) 	<ul style="list-style-type: none"> Making data-driven decisions for continuous process improvement Measuring quantifiable outcomes to validate success
Digitization	<ul style="list-style-type: none"> Recreate forms into digital requests Generate pre-populated PDF documents Capture document e-signatures Complete HR onboarding tasks 	<ul style="list-style-type: none"> Digitized paper attracts E-signatures Electronic checklists 	<ul style="list-style-type: none"> Reducing the manual routing and delivery of paper documents Standardizing forms to promote consistency across requests Increasing compliance reporting Reducing manual data entry
Unified UI	<ul style="list-style-type: none"> Build bi-directional integrations with external systems Create a single end-to-end experience for all onboarding participants 	<ul style="list-style-type: none"> Bi-directional integrations Single experience layer for all onboarding interactions 	<ul style="list-style-type: none"> Elevating the onboarding experience across the enterprise Eliminating manual data entry between systems

Table 3: ServiceNow Onboarding Maturity Model detail

Use this model to guide your onboarding service implementation roadmap. For example, if you're just getting started, you're moving from foundational to single destination to optimization

in the maturity model. Identify the quick wins you can create as you move between these phases to build momentum and support for additional phases.

Action step 3: Define the initial scope of your enterprise onboarding service

Define the initial scope of your enterprise onboarding service, including how users will engage with the service and what it will deliver, to promote your business objectives. Clearly defining the initial scope for your service is necessary to educate your implementation project team, partners (if applicable), key stakeholders, and business partners on what the service will deliver, relative to your business outcomes. Refer to the ServiceNow Enterprise Onboarding Maturity Model to help guide the scope and phases of deployment.

You can define your scope in a simple one-page document or in a more extensive business requirements document. No matter what form you use, the document should answer these questions:

- What is the business vision for the service? It might be something like “digital workflows that manage employee lifecycle events across multiple departments and functions.”
- What is included in the service?
- What use cases will the service address? For example, it might address employee preboarding or employee onboarding.
- What geographies will use the service in initial and later phases?
- Which employee populations will be in scope in initial and later phases?
- What departments will be included in the service in initial and later phases? Are they IT, HR, facilities, security, payroll, or others?
- What business outcomes do we expect and by when? Include the business objectives from Step 1 above with defined measures of success.

INSIGHT:

Provide a clear definition of the onboarding service to key stakeholders

Organizations may make the mistake of engaging key stakeholders to gain buy-in for the onboarding service without clarity on its scope or what it will deliver. Your service owner needs to have a clear, crisp way to communicate with stakeholder's cross-functionally and regionally so they can understand the benefits and scope of the onboarding service.

Best practice – Create an enterprise onboarding service definition “on a page” to use in when engaging with key stakeholders

Create a one-pager that articulates the definition and blueprint for your onboarding service to help recruit and gain buy-in from key stakeholders. Use Table 4 to identify the key elements of the one-pager.

Enterprise onboarding service definitions	
Business vision	Use the ServiceNow Enterprise Onboarding service to manage onboarding tasks and documents using simple user interfaces that incorporate workflows in the ServiceNow portal, minimize email, limit the number of times a new hire is asked to provide the same information (e.g., name, address, tax information) and getting employees to productivity faster.
Key benefits	<ul style="list-style-type: none"> • Reduce the time spent on manual onboarding tasks and activities. • Provide a more engaging onboarding user experience and improve employee satisfaction. • Provide step-by-step guidance to employees and managers during the onboarding process. • Enable employees to be productive on day one of employment.
Scope	
In scope	<ul style="list-style-type: none"> • Enterprise onboarding for regular employees and rehires in the US and Canada – Phase 1 (Additional countries will be added in later phase.) • Confidentiality of information provided by HR or the new hire should be maintained, and all ServiceNow data privacy rules must be followed
Out of scope	<ul style="list-style-type: none"> • HR onboarding for contingent workers • Off-boarding requests • Employee change requests
KPIs	<ul style="list-style-type: none"> • Productivity/efficiency gains (the current time spent per onboarding case measured before and after is based on the number of decision points, manual data entry, activities outside of the onboarding tool, exception handling, etc.) • Reduction in manual effort for HCM team to enter data

Table 4: Sample onboarding service definition "on a page"

Table 5 shows an example that a ServiceNow customer used to articulate their service definition and priorities in a short, simple list.

Onboarding priorities	
Central location	New hires and managers can visit one area to complete all the onboarding needs via desktop or mobile.
Integrations	Reduce blind spots and manual actions: Applicant Tracking System (ATS), reporting, HCM, ITSM, e-signatures.
Drive action	Incorporate and automate actions from other departments: IT, facilities, security, or payroll.
Automation and visibility	Create efficiency through automation and digitization to provide end-to-end visibility.

Table 5: Onboarding priorities from a ServiceNow customer

Action step 4: Include a vision for user experience (UX) in your onboarding service definition

Onboarding workflows should be intuitive for both new hires and the staff supporting the onboarding processes. Incorporate a vision for the UX in your service definition to ensure the experience remains a priority when you design your onboarding service. Ideally, the UX should be consistent across onboarding workflows to ensure a seamless look and feel across processes. Use personas, journey storyboarding, and user testing throughout your design to ensure your implementation remains aligned with the objectives you defined.

INSIGHT:

Think about the UX in terms of effort

The UX is often misinterpreted as being only pleasing aesthetics or graphic design, neither of which is enough to drive lasting service adoption. To drive adoption, your onboarding service will need to deliver an experience that lets users achieve their desired outcomes with minimal effort, using an intuitive interface.

Best practice – Define a few concrete requirements that capture your UX vision and that connect to your business objectives

Your service definition should include a small number of concrete UX requirements—these don't have to be comprehensive, but they should help stakeholders envision your desired end state and connect UX to your overall goals for the service. The Table 6 shows a few examples of this.

Business objective	UX requirement
Improve the efficiency of the onboarding process	<ul style="list-style-type: none"> New hires will be able to access self-service resources through a mobile interface. Hiring managers will have a one-click process to initiate onboarding.
Improve visibility into onboarding activities	<ul style="list-style-type: none"> New hires, hiring managers, and fulfillers will have real-time access to the status of activities and receive email-based notifications as activities are initiated and completed.
Improve our employer brand	<ul style="list-style-type: none"> Messages reinforcing our brand and corporate values will be highlighted to new hires as activities are initiated and completed.

Table 6: Examples of UX requirements that can be included in your onboarding service definition

For more guidance, check out [Tips for Creating an Effective Onboarding Site](#) and [5 Steps to Create an Onboarding Program for Managers](#) on the Society for Human Resource Management (SHRM) website.

Best practice – Define onboarding personas

Work with the UX experts in your organization to define onboarding personas, both for new hires and the roles involved in onboarding activities. A [persona](#) is a tool to better understand your onboarding stakeholders, resulting in better decisions when you begin to design your service. Consider the following when defining onboarding personas:

- Perform research. Conduct user interviews to get insights into the behaviors, attitudes, existing pain points, and goals of your onboarding stakeholders. For onboarding, key stakeholders may include:
 - Hiring managers
 - New hires
 - Departmental process users (like HR, IT, facilities, payroll, etc.) and process owners
- It's also important to note that you can't just examine what users are saying to you—you need to tap into what they're thinking and how they behave when performing tasks.
- Hold a workshop to encourage your stakeholders to articulate their needs.
- Map personas by job area, functions/departments, and regions (if needed). You'll turn to this information in the design of your onboarding service in Step 2.

What to do next

Now that you've defined your onboarding service's stakeholders, objectives, and desired experience, you're ready to design the service.

Be prepared to revisit this step, especially when:

- Your executive sponsor(s) changes
- Your HR strategy changes

- Your talent dynamics change (like an increase or decrease in hiring, global expansion, or mergers and acquisitions)
- Your enterprise architecture changes (such as when you add new systems and tools)

Use the ServiceNow Onboarding Maturity Model to guide your service roadmap. Review your business objectives and definition at least once or twice per year with your strategic governance function as you expand the service.

Step 2 – Design the onboarding service

KEY INSIGHTS

- A phased approach will help you achieve quick wins in terms of early adoption and success stories you can use as you expand your service roadmap.
- When considering your initial phase, look at your existing service catalog and identify onboarding activities already in place.
- Identify common onboarding activities between departments and regions that you can use globally across the onboarding service.

Once you've defined the service, your initial implementation phase should be based on a simple design that provides the foundation for a blueprint you can repeat and scale across your organization.

To design the onboarding service, complete these action steps. Keep in mind our customers' insights—they're the ones who performed these actions.

Action step 1: Understand the framework of lifecycle events

It's important to understand how ServiceNow refers to the data elements of an onboarding service. Onboarding is considered a *lifecycle event* and consists of *activity sets* such as pre-hire, preboarding, and day one. Each *activity set* is made up of *activities*, which include a set of *tasks* (such as "enroll in medical benefits" or "order business cards") that need to be assigned to complete an activity. See Figure 2 for a depiction of this hierarchy with an example. The full OOTB hierarchy is available in Table 8, starting on page 22.

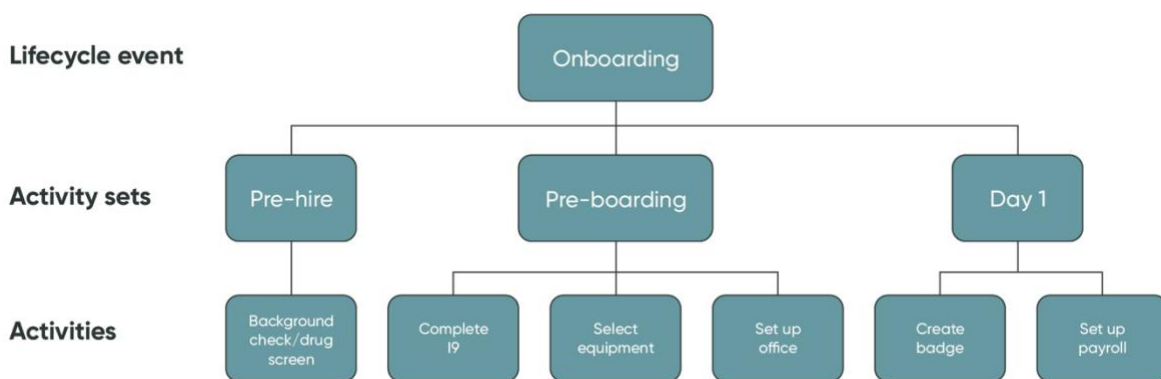


Figure 2: Enterprise onboarding event definition

Action step 2: Scope your initial phase

Develop an onboarding service roadmap for your initial phase that's designed to help you build a repeatable blueprint for later phases. Based on your business objectives and priorities, you may want to focus on a specific, targeted employee segment. Ideally, create a segment that:

1. Demonstrate clear ROI
2. Develop the lessons learned that you can apply to other populations.

For example, your sales organization may be targeting a high volume of new hires in the next fiscal year, requiring accelerated onboarding.

Consider the following factors when you identify your initial phase:

- Geography
- Departments
- Employee type

Identifying this segment will help provide direction and set priorities as you identify initial project resources. You may decide to focus the initial phase on a narrow group of employees, such as U.S.-based sales employees for IT fulfillment only.

INSIGHT:

Don't over-scope your initial phase

ServiceNow Enterprise Onboarding makes it possible for organizations to automate onboarding activities across departmental boundaries (like IT, payroll, facilities, etc.). However, implementing enterprise onboarding requires substantial cross-functional coordination. Many organizations underestimate dependencies and collaboration needs when designing workflows across departments. Process maps, artifacts, and data stores are likely to be inconsistent and incomplete across departments and process owners. The work needed to implement enterprise onboarding as a big bang across all departments and employee populations will require a longer time to value relative to a phased approach to the implementation. A phased approach will help you achieve quick wins in terms of early adoption and success stories you can use as you expand your service roadmap.

Best practice – Scope your initial service to the minimum necessary to define a repeatable blueprint for rollouts to other activities, departments, and regions

Taking an MVP approach to launch the service will allow for a shorter initial implementation and decrease your time to value. You can subsequently scale the maturity of the service based on feedback from your initial users. When considering your MVP, look for quick wins among high-volume, low-complexity hiring populations. Here's one example: high volumes of US-based sales employees with standard (and simple) IT fulfillment requirements. In this case, you're likely to create far more value with this population in terms of their time to productivity and the time savings for personnel involved in onboarding processes, than with a smaller population with more complex requirements.

Using the business objectives you established in Step 1, scope your initial implementation phase of the onboarding service, ideally using Agile techniques. Figure 3 demonstrates how to break your implementation into sprints based on employee type and/or geographical location.

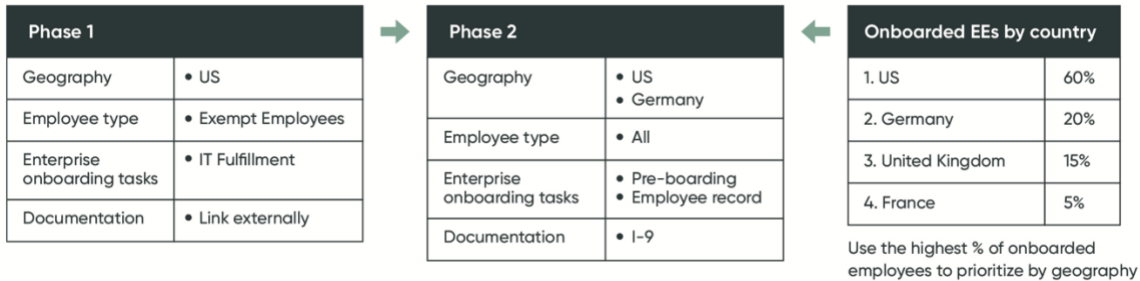


Figure 3: Sample onboarding service scope

Delivering in the service in sprints provides you a repeatable way to scale rollouts across departments and regions.

EXPERT TIPS

Don't digitize documents within ServiceNow in the initial phase—that can eat up a lot of time in implementation. Instead, link to where documents exist today (for example, link to PeopleSoft or to the files uploaded in ServiceNow). In later phases you can automatically generate the PDFs you need directly within ServiceNow.

Check out the ServiceNow [Onboarding Rapid Results Implementation Accelerator](#) package, which provides additional content and activities to accelerate implementation through an interactive guided setup process.

Action step 3: Meet with relevant process owners (those in scope) to understand your current state

Understand the onboarding objectives and metrics your relevant, in-scope process owners would like to achieve. Review the business objectives and service definition you developed in Step 1, then uncover immediate departmental needs and surface any potential objections to the new onboarding service.

Action step 4: Capture process maps and requirements for onboarding activities

Consider each of the steps that need to happen to onboard new hires. Perform process mapping to understand the process all users in the onboarding process go through in order to accomplish an onboarding goal. To maximize value early on, prioritize mapping existing processes looking for activities that have long cycle times (such as provisioning a laptop), unnecessary handoffs, bad experiences (like an error in a direct deposit setup), and so on.

Create a process map through existing artifacts, stakeholder interviews, or a workshop with key stakeholders. Figure 4 shows an example of a process map.

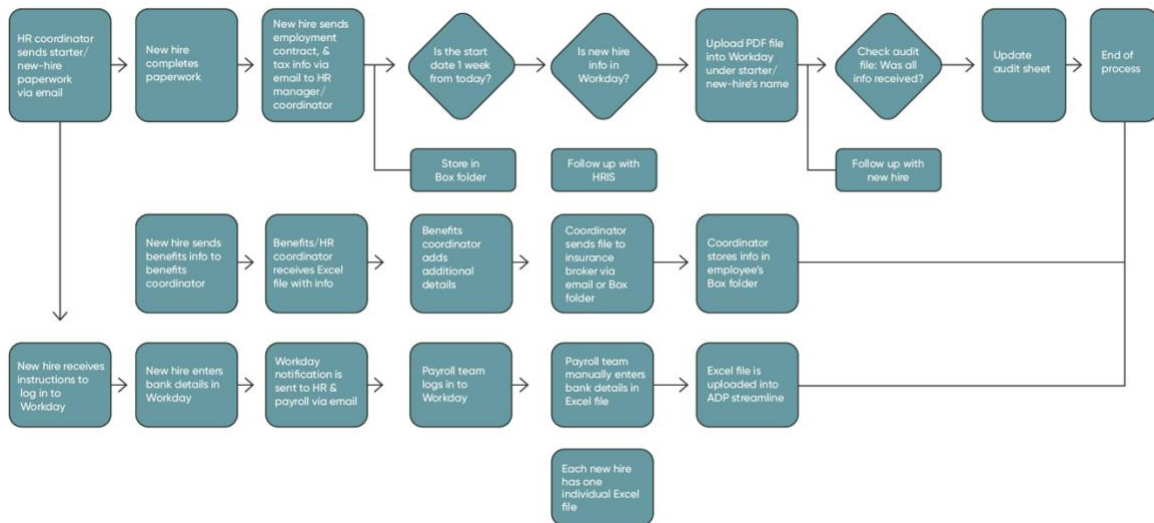


Figure 4: Sample process map of an existing onboarding process flow

Next, create a requirements workbook (see Table 7) to capture specific the onboarding activities reflected in your process maps. Include key dependencies and data requirements for each activity. For example, creating a new employee profile may require an integration to an identity management, applicant tracking system or HCM system (so you'll need to account for the third-party vendor and an integration). Other considerations may include security provisions for new hire data to meet data privacy and security requirements.

ID	Category	Requirements	Priority	Dependency
1	New hire profile	The New Hire Profile Form will collect all necessary personal information for HCM profile.	1	Integration to HCM
2	IT account access	Send a task to the hiring manager to determine the new hire's IT account access	1	Hiring manager input

Table 7: Enterprise Onboarding Requirements Example

To ensure the accuracy of your process and requirements capture, ask for:

- Sample emails to internal stakeholders and to new hires
- Checklists used to support the process
- Documents required to be signed or reviewed by new hires
- Spreadsheets or other tools used to track onboarding

You should also shadow onboarding coordinators to document each action they're responsible for in onboarding as an accuracy check on your process and requirements maps.

As you capture business requirements, there will be differences in objectives across departments and regions. The design phase is the time to start establishing **governance**. Having governance in place is critical as you expand your onboarding service roadmap (Step 4 in this playbook) and increase the number of stakeholders involved in the build process.

Action step 5: Identify and design the most critical onboarding activities to realize your service objectives

ServiceNow recommends a phased implementation with the first release as an MVP. For your MVP, design the most critical onboarding activities first. Once you have your process map complete, you can start to put together activity sets and identify the primary activities in your initial phase to achieve immediate value. These activities might be, for example, provisioning a laptop from IT or provisioning a desk from facilities. Figure 5 demonstrates how you can list onboarding activities and break them down into tasks. (Note: These should also be reflected in your process maps.)

Identify the tasks, based on their potential value, that you want to single out as MVP candidates for your initial phase. For example, if you're onboarding new hires in customer support and laptop provisioning is essential for day one productivity, make sure to prioritize that as an MVP task.

Pre-boarding	Background check	Employee record	IT fulfillment	Policies		Day 1 prep	Day 1		Onboarding complete
Start onboarding	Account creation and log-in info	Complete new hire profile	IT account access	Anti-harassment	Confirm NHO logistics	Day 1 prep checklist	NHO attendance	New hire swag	Onboarding complete
	Background check	Sign at-will employment & NDA agreement	Onboard workspace request	Anti-corruption	Acceptable use		New hire solution consultant task	Trainings in the Learning Portal	
	Initiate electronic I-9	Confirm prior inventions	Select computer & accessories	Code of conduct & ethics	Functional office physical security standards		Month 1 checklist	Complete talent profile	
	Remote I-9 instructions	Sign arbitration agreement	Legal review of Exhibit A	Information security policy	Health & safety		Benefits enrollment	Update background check status (Conditional)	
	FTC consumer rights			Domestic violence	Information security standards		Business cards	Manager toolkit	
				Insider trading	Privacy policy		Corporate credit card		
				Upload completed I-9 form	CA Workers' Comp policy docs		New hire information & toolkit		
				Immigration processing status	Update background check status		NHO attendance		

Legend

System task	Task for: New hire	Task for: Recruitment coordinator	Task for: Manager	Task for: NHO facilitator	Task for: Other fulfiller
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Figure 5: Now on Now example – How ServiceNow groups tasks into onboarding activities

As your tasks are identified and prioritized, you can then design activities within the ServiceNow framework to build a new hire activity set. You will subsequently map handoffs between activity sets to design the end-to-end service. See Figure 6 for a model.

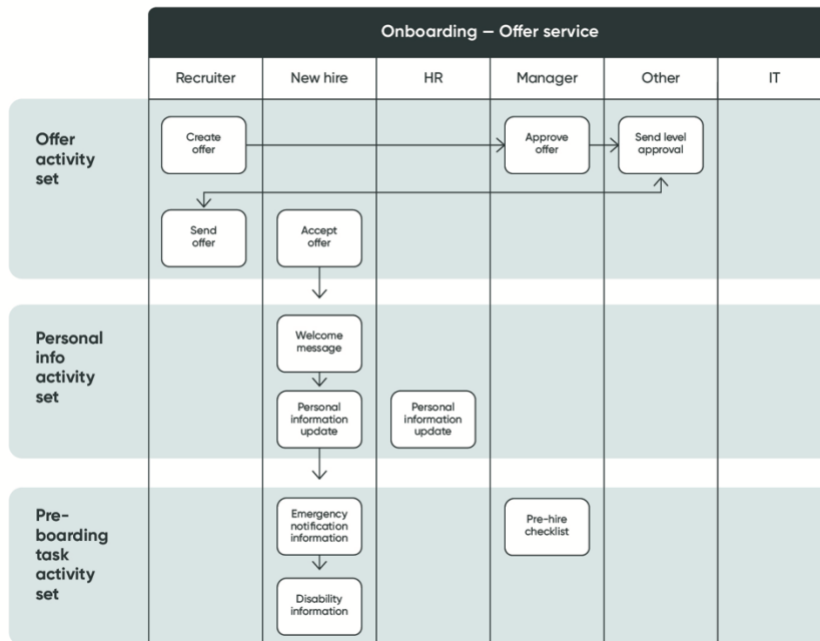


Figure 6: Onboarding service design

EXPERT TIP

When designing activities, include white-glove service requirements for executives (like your SVPs). To create a high-touch or white-glove approach, add tasks in activities (like tasks that can be assigned to executive assistants for coordination).

The time to implement your MVP can vary based on your organization's size and other factors, such as the availability of documentation for existing processes or availability of existing enterprise services that are already in place (like IT requests). On average, you should estimate two to three months of time to deploy your MVP.

Check out our video, [HRSD Enterprise Onboarding and Transition Configuration](#), and [product documentation](#) to learn more about how to configure lifecycle events.

INSIGHT:

Reuse onboarding activities already in place when building new workflows

When scoping the initial phase of an onboarding service, organizations tend to either look to reinvent the onboarding process or just lift and shift existing processes that may not be working well. To achieve quick wins, look to reuse onboarding activities that are already in place and working well. For example, you may already have an onboarding activity in place as part of IT fulfillment such as provisioning for a laptop or a phone. Is the process already working well, or does it need only minor updates to improve its experience and efficiency?

Best practice – Evaluate and consume good onboarding activities already in place

When considering your initial phase, look at your existing service catalog and identify onboarding activities already in place. A good start would be IT fulfillment if you've already implemented it in ITSM. Are your existing IT provisioning activities working well by adding value through efficiency or a better experience? Also, to increase your speed to market, look at tasks that link out to other systems (e.g., PeopleSoft, benefits, payroll, learning, etc.) to complete the necessary activities.

Best practice – Use OOTB activities for quick wins

The ServiceNow Enterprise Onboarding and Transition module comes OOTB with preconfigured life cycle events and OOTB data you can change to make your own activities (rather than creating new activities from scratch). Use Table 8 to understand what ServiceNow offers OOTB for activity sets and activities.

Activity set	Pre-hire	Preboarding	Day 1	Week 1	Day 30
Activities	<ul style="list-style-type: none"> • Background check • Drug screen • New hire documentation • Account notification 	<ul style="list-style-type: none"> • Set up Active Directory account • Set up email • Select network/cloud access accounts • Select equipment • Set up payroll • Enroll for dental benefits • Enroll for medical benefits • Enroll for vision benefits • Set up direct deposit • Watch onboarding video • Complete profile information • Work visa transfer • Relocation assistance • Hiring manager checklist 	<ul style="list-style-type: none"> • Setup phone and voicemail • Verify work authorization • Send a welcome email to team 	<ul style="list-style-type: none"> • Complete the mandatory training 	<ul style="list-style-type: none"> • New hire onboarding survey • Hiring manager onboarding survey

Table 8: OOTB Activity sets and activities in ServiceNow

INSIGHT:

Identify opportunities for activity streamlining or consolidation in an initial service offering

As you meet process owners in different departments and regions, it's not uncommon for each to have different requirements for similar onboarding activities. Ideally, you want to achieve efficiencies within onboarding activities when possible, but you may experience opposition from process owners when you propose to streamline or consolidate their activities. Process owners may not recognize commonalities across the enterprise, or they may be resistant to changing existing processes.

While there will be activities that may need to remain unique due to compliance requirements, identify and consolidate common activities that span multiple departments and regions, and let process owners know about the benefits they'll receive as a result.

Best practice – Identify common activities that can be standardized globally for greater efficiency

Identify common onboarding activities between departments and regions that can be used globally across the onboarding service. Policy training is a great example of a global onboarding activity. All departments and regions will require new hires to complete policy training tasks in the areas of security, data privacy, and so on.

EXPERT TIP

The design team should be able to weigh the options between creating a specific activity for a subset group or providing global activities with different inputs available to different subset groups. For example, if all countries want to collect personal information and just a subset of countries want to collect some additional attributes for personal information, the decision to have a new activity should be based on whether those additional attributes could exist on their own activity or can be consolidated into the personal information activity.

Action step 6: Design your Employee Service Center Onboarding portal

ServiceNow Enterprise Onboarding also comes with the [Employee Service Center](#) portal where users such as new hires, hiring managers, and process users (like those from HR, IT, or facilities) can complete onboarding activities and see the status of those activities. Figure 7 demonstrates an example of a single starting point for all hiring activities. Incorporate your UX strategy into the design of your onboarding portal.

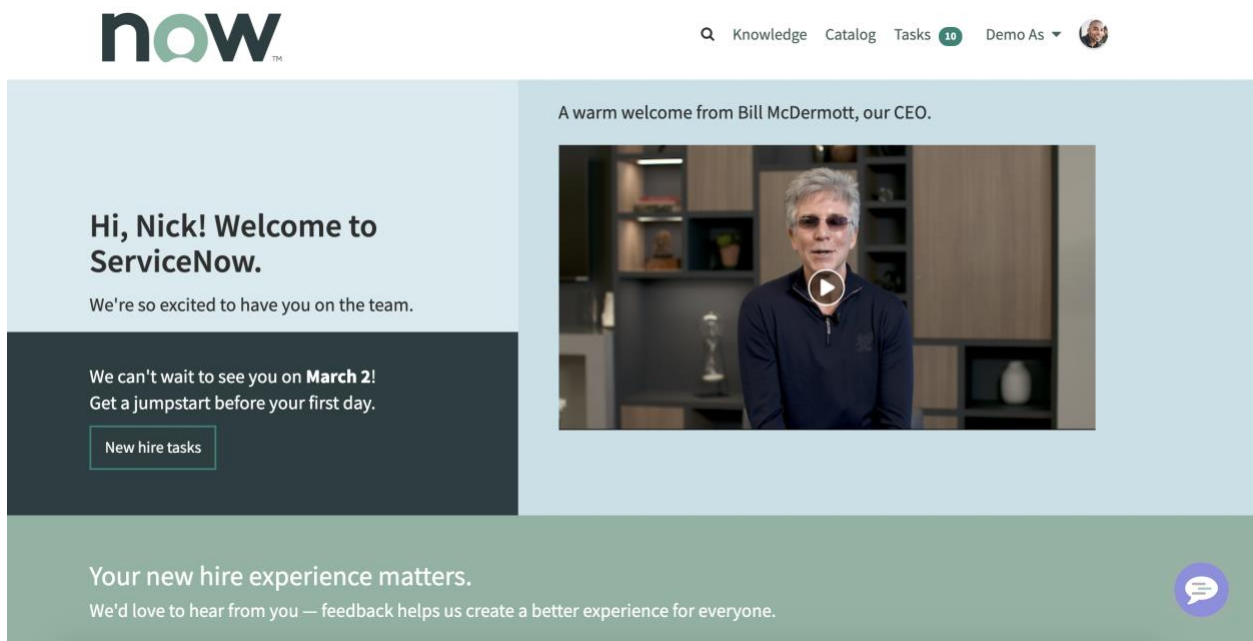


Figure 7: Onboarding Employee Service Center

Action step 7: Map your enterprise onboarding architecture to identify third-party system integrations

Many onboarding activities rely on integrating to third-party systems to complete tasks and access key elements of data. For example, most organizations rely on their identity management or HCM (such as SAP SuccessFactors, Workday, UltiPro, or Oracle) as the system of record for employee data that flows into ServiceNow to complete onboarding activities. These integrations are critical paths to performing onboarding activities.

Make sure you account for these integrations in the initial phase of your onboarding service. Figure 8 shows an example of the systems and flow of data between them.

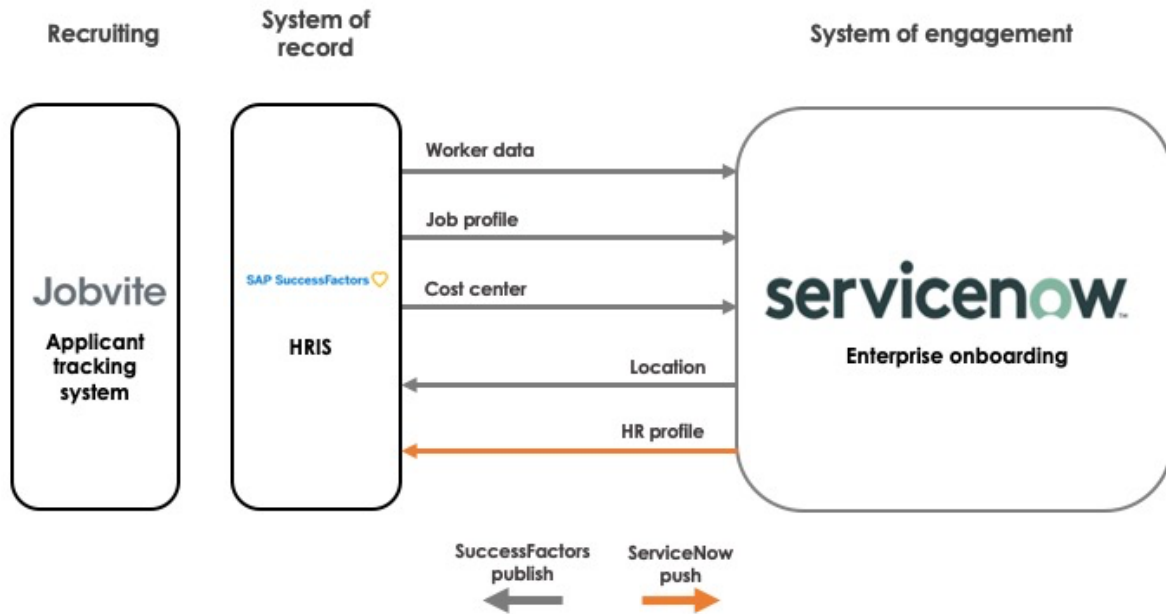


Figure 8: Example of onboarding system architecture

Reuse existing integrations in your initial phase, but also identify which integrations will need to be built in a later phase of implementation.

INSIGHT:

Include comprehensive test plans for system integrations

Launching an enterprise onboarding service will include integrations to multiple systems outside of the Now Platform®. You may have existing integrations, but the configuration of the new service may have changed the flow of data. Revalidate the flow of data between integrated systems (e.g., HCM, ATS, LMS, etc.) and create test plans to ensure the data flows accurately.

Best practice – Prioritize system integration testing

Ensuring the integrations of third-party systems is vital to the launch of the onboarding service. Here's why: Systems like identity management, benefits administration, and your core HCM are critical paths to completing onboarding activities. If system integrations break, the service will fail and result in a poor experience for all users involved—especially for your new hires who are expecting a great employee experience as they come into your organization.

What to do next

Having designed the initial phase of the onboarding service, you're ready to engage users and build a plan for service adoption. The great news is that you've designed a repeatable blueprint process that you'll revisit during each phase in your service roadmap.

Step 3 – Develop a plan for service adoption

KEY INSIGHTS

- Involving process owners and users in user acceptance testing (UAT) is your first step in organizational change management (OCM).
- Ensure training or communication plans reinforce the *why* of the new service.

Now that your onboarding service has been designed, effective adoption and value realization depends on the right testing, training, and communication plans. It's critical that you engage users and promote the new service to drive adoption.

To do this, complete these action steps. Pay close attention to the customers' insights—they're the ones who performed these actions.

Action step 1: Test your design of onboarding activities with key stakeholders and users

Include representative users (from the personas defined in Step 1) in UAT. Operational stresses that cannot be accounted for in design or earlier testing can only be found during the user acceptance phase. Key process owners and users will interact with the service daily and cannot only identify broken processes, but they can also be a critical source of ideas for design improvements. When you have diversity among the users you include in testing, it'll help you cover your use cases more broadly, which will help improve the scope of the issues you uncover in testing.

INSIGHT 1:

Include new hires in user acceptance testing

Also account for testing and feedback from new hires when you test. Consider running a pilot for a small segment of upcoming new hires, but make sure you educate and prepare the hiring manager and departmental process owners and users—even though it's a pilot, you don't want new hires to have a poor onboarding experience. You may even want to disclose to your pilot group of new hires that the onboarding solution is a pilot and see if they're willing to opt in to using it.

Best practice – Make UAT your first step to involve key process owners and users in OCM

Building support for change is critical to service adoption—without buy-in from process owners and users, they may revert to their old onboarding processes. Getting them to participate in UAT can be the first step to involving them in the development of OCM plans and messages. As you involve them in UAT, ask these stakeholders to be ServiceNow champions for the service. Champions are important because they help inform implementation planning, communication, training, and go-live preparation with an understanding of what people in the organization need to be able to effectively adopt the new onboarding service.

Action step 2: Support service rollout with training and communications

To deliver a world-class onboarding service, all users should be included in your training plan. This includes your new hires, hiring managers, and the staff supporting onboarding.

Build custom training for your process users prior to go-live. This training should:

- Show users how to use the new onboarding service
- Communicate the value it will bring to the organization and individuals

Involving process users and hiring managers in UAT is also an effective method to train them early in the launch.

Review our Success Playbook on [building an internal team of ServiceNow experts and training users](#) for more details on how to build an effective training plan.

Support your rollout with a communication and promotion plan tied to the launch of the new service. Build exposure to training opportunities and drive adoption by treating the launch like a marketing campaign. Using tactics like targeted communications to hiring managers, flyers in high-traffic areas, social media channels, gamification, giveaways, and other techniques. To learn more OCM techniques, see our [Customer Success Center](#) resources for creating a change management plan.

INSIGHT:

Ensure training or communication plans reinforce the why of the new service

A common mistake organizations make when launching a new service like onboarding is to treat training as a one-time activity or assume the service is intuitive, people assume that training is unnecessary. It's also a common mistake to deploy an onboarding service without telling users that the service is even being launched and why. Your process users need to learn how to use the new onboarding service as well as understand why the way they work will be changing and how it will benefit them.

Best practice – Provide multi-modal user training and communications that are always on, not just used at rollout

Training should be broadly available at any time, using both self-service and classroom-style training:

- **Process users** – Offer a mix of classroom and virtual training to ensure they can use ServiceNow functionality effectively.
- **Hiring managers** – For most managers, hiring is an infrequent event. Offer just-in-time training such as how-to videos, knowledge base articles, and FAQs.
- **New hires** – Short videos and other content should be readily available in the new hire service portal to answer the most frequent questions.

"If your process user teams have used ServiceNow before, training will be easier. For example, the U.S. was already using ServiceNow's HRSD case and knowledge management capabilities when we added onboarding. However, for regions new to ServiceNow, there's more of a learning curve. We experienced a lower adoption rate in a country where the process users hadn't used it before. Make sure to employ extra focus on training and OCM in this scenario."

– A ServiceNow customer

EXPERT TIP

Working with relevant process owners, the executive sponsor and onboarding service owner should communicate explicit instructions for cutover between any older solutions to the new onboarding service in your training plan, to avoid a poor onboarding experience during the transition. There may be a timeframe where hiring managers and support staff must use two onboarding solutions that run in parallel.

What to do next

When you have included key stakeholders and users in testing, trained them and promoted the new onboarding service, you can achieve more effective adoption. Be prepared to revisit your testing, training, and promotion with each new phase of service expansion.

Step 4 – Scale and extend across the enterprise

KEY INSIGHTS

- Identify the lessons learned and success measures for your initial phase and use those learnings as opportunities for the next release phase of your onboarding service.

To realize value at scale, iterate on your initial phase and develop a roadmap for expanding your service. Again, check out the ServiceNow Onboarding Maturity Model shown in Step 1.

To do this, complete these action steps. Pay close attention to the customers' insights—they're the ones who performed these actions.

Action step 1: Measure and evaluate your initial phase

In Step 1, you established measurable business objectives and baseline metrics. As you complete the initial phase of your implementation, you'll want to measure your progress against those objectives and the value achieved from the service.

You should also evaluate the process used to launch the service and identify opportunities for improvement in the next phase. You can survey different types of users (e.g., new hires, process users, hiring managers) and hold "lessons learned" sessions to get feedback.

In each phase, repeat this measurement and evaluation process so you can measure your continuous improvement.

INSIGHT:

Identify the lessons learned and success measures for your initial phase

When you launch your onboarding service, the service owner should ask the following strategic questions:

- How do we know if it's been a success or failure?
- How do we identify the pitfalls that occurred during the implementation and launch? What best practices did we employ (or should we adopt) to avoid those pitfalls?
- Did we achieve our business objectives? What were our measures of success?

Best practice – Perform a "lessons learned" review after MVP

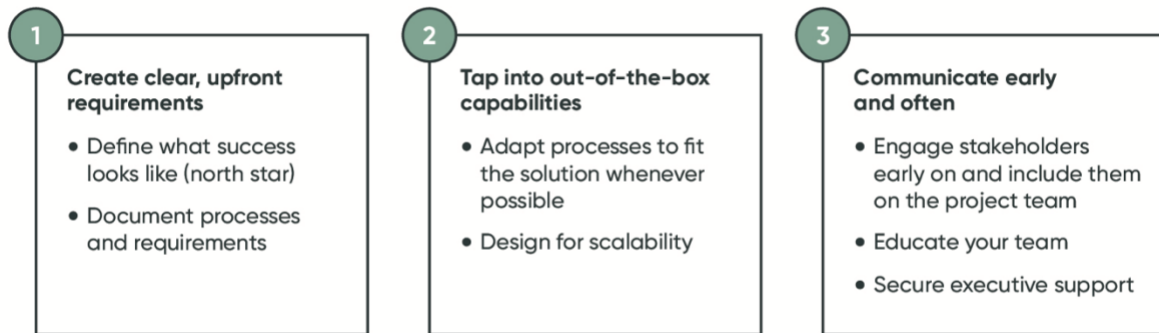
Work with your project management resources to facilitate a "lessons learned" review, involving your key stakeholders. Your discussion, especially with process owners, should address the following questions:

- Were our business objectives achieved?
- What went well? What examples of success happened because of the service?
- What didn't go well? Were there any unintended outcomes?
- What might have been better handled if we'd done it differently?

- What recommendations should we incorporate into the next phase of the service roadmap?
- What could we automate or simplify?

Figure 9 shows an example of the top three lessons learned from the Now on Now team's launch of the ServiceNow Enterprise Onboarding service, along with recommendations for the next release phase.

Top lessons learned – Initial phase of enterprise onboarding



Phase 2 next steps

- Incorporate learnings for Phase 2 of enterprise onboarding (10+ countries)
- Implement Performance Analytics dashboards to drive additional insights/actions
- Improve existing HR services and implement new automated services

Figure 9: Now on Now example – Lessons ServiceNow developed from its enterprise onboarding rollout

Best practice – Develop a service performance scorecard

Developing a performance scorecard will help determine if you achieve your business outcomes. A simple scorecard can include KPIs such as:

- Time to new hire productivity
- New hire satisfaction with onboarding
- % of employees retained after one year of employment
- Reduction (or increase) in the cost of onboarding

See Step 1 for examples of metrics that can reflect your business objectives. You can also use Now Platform reporting and survey tools, including:

- [The HR Onboarding Executive dashboard](#), which gives HR executives insights into how smoothly new employees can progress through onboarding activities
- [HR Performance Analytics](#), which measures KPIs to track performance over time through preconfigured dashboards that contain actionable data visualizations that help improve business processes and practices
- [HR Satisfaction Surveys](#), which are available in predefined formats but can be modified to meet your needs (Note: You can also create new HR surveys to gather feedback on your onboarding service. See Figure 10.)

“We survey our new hires on their onboarding satisfaction at 30 and 90 days to ensure they are receiving an optimal employee experience.”
– A ServiceNow customer

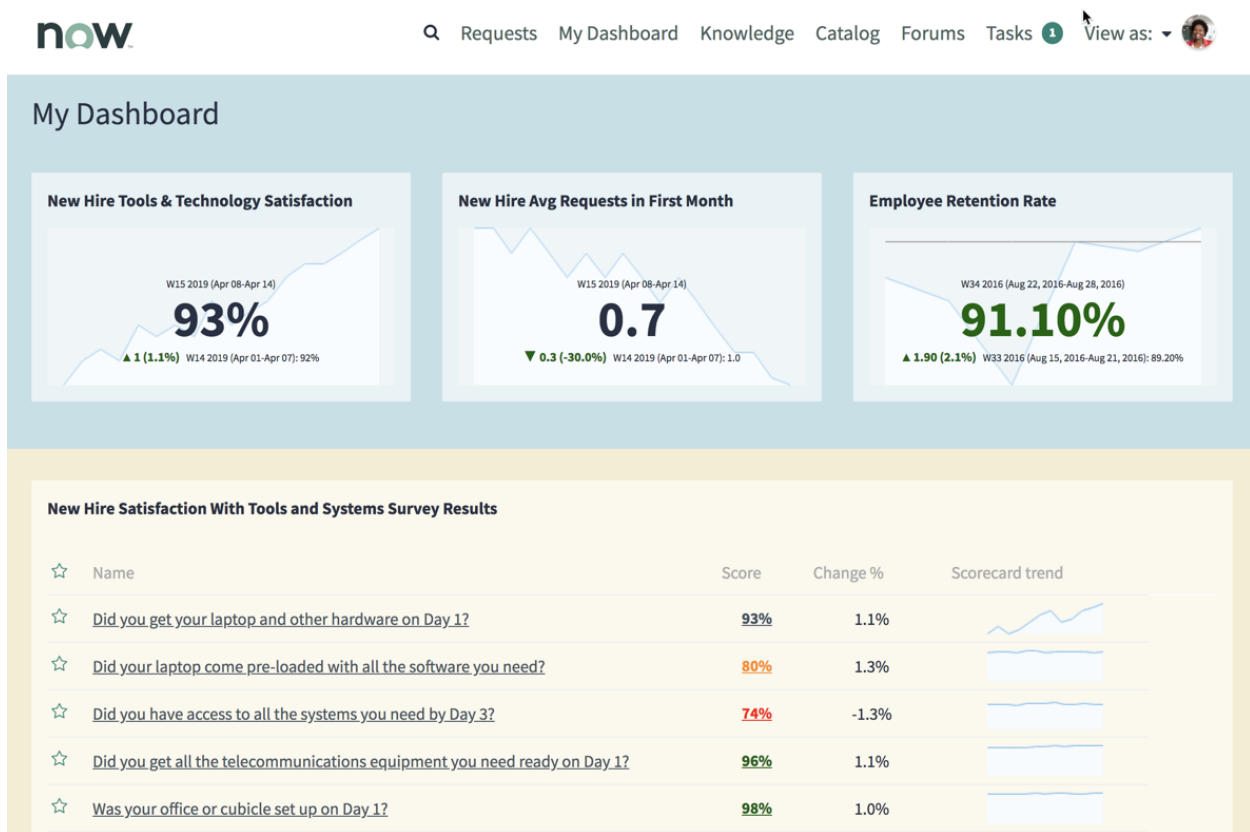


Figure 10: ServiceNow New Hire Satisfaction dashboard

Survey the team of key stakeholders from the project team assembled to launch the service. You'll want their feedback to determine the success of the process used to design and launch your initial phase.

Your scorecard should cover a combination of quantitative and qualitative value outcomes as seen in Now on Now example in Table 9.

Quantitative value outcomes	
94%	Acceleration in new hire IT provisioning
4,000	Hours saved per year by automating onboarding activities
99%	Completion of compliance policy tasks before day one
86%	Employee onboarding satisfaction
Qualitative value outcomes	
Enhanced experience	<ul style="list-style-type: none"> Positive onboarding experience set the tone for the days ahead HR, IT, and facilities colleagues are freed from administrative burden with a single system of action
Accelerated time to value	<ul style="list-style-type: none"> New employees come up to speed more quickly, get used to ServiceNow, and become productive contributors
Better insight	<ul style="list-style-type: none"> HR dashboards improve process management and drive better-informed decisions Surveys are integrated into the platform

Table 9: Now on Now example – How ServiceNow defined quantitative and qualitative value outcomes from its enterprise onboarding service

Action step 2: Extend the onboarding service roadmap

Revisit the roadmap you created in Step 2 and determine how you will extend the delivery of the onboarding beyond the initial phase (whether that's to new geographies, groups, or activities). Your roadmap should continue to sequence your rollout with an eye toward short-term quick wins and longer-term business outcomes, as covered in Step 2.

INSIGHT:

Establish governance

The complexity of an onboarding service spanning different departments and regions isn't just a challenge to initial implementation—differences in local objectives and requirements will continue to challenge the operation and expansion of your service. Process owners will have a tendency to want to customize the service to meet unique needs that may deviate from your business objectives and vision for the service. Establishing governance will help ensure your roadmap can scale service expansion, while it continues to support your organization's business needs.

Best practice – Ensure demand management is in place for customization

Your service owner, in conjunction with your ServiceNow platform team, should oversee a demand intake process that assesses requests for local customization. This should be based on a standardized scoring system, as we detail in our Success Playbook on avoiding customization pitfalls. If you allow for customization, you should have clear technical guidelines for implementing local customization.

Action step 3: Develop a plan to extend lifecycle events

ServiceNow Enterprise Onboarding allows organizations to create lifecycle events beyond new hire onboarding. Some lifecycle events to consider for inclusion in your roadmap are offboarding, job transfer, parental leave/benefits, and other moments that matter. Develop a plan to research these options, meet with the departmental process owners associated with these events, and determine what to incorporate in your onboarding service roadmap.

Extending lifecycle events beyond onboarding will require extending an original business case. Work with process owners to understand the inefficiencies, pain points around the employee experience, and potential use cases for additional lifecycle events. As you did with onboarding, define measurable business objectives for your new use cases, get guidance from your executive sponsor on priorities, and incorporate additional lifecycle events in your phased roadmap.

What to do next

Having developed a repeatable blueprint from your initial phase, you're ready to expand the roadmap for the onboarding service. Frequently revisit your lessons learned and KPIs to refine and expand the service and extend lifecycle events beyond onboarding for additional value.

The takeaway

Enterprise onboarding touches many departments and requires several processes to achieve a great employee experience for new hires and the internal teams that use the services (like process users and hiring managers). Use our Onboarding Maturity Model to help guide the evolution of your onboarding service to achieve quick wins and build support. Use process mapping to design your service, include users in testing, and provide multi-modal training tools to all users of the service to help you build a repeatable process for expansion.

What does “good, better, and best” look like for this activity?

Good – You've defined the business objectives and scope for the initial phase of your onboarding service and mapped your existing onboarding processes.

Better – You've met your business objectives for the initial phase of the onboarding service and built a repeatable process to expand its scope.

Best – You've achieved or surpassed your estimated business value for your service and have identified opportunities to expand your service to additional lifecycle events.

What should I convey to my team?

Building an onboarding service can be challenged by cross-departmental complexity. Taking a phased approach offers us the opportunity to achieve quick wins and learn through continuous improvement at each phase.

If you have any questions on this topic or you would like to be a contributor to future ServiceNow best practice content, please contact us at best.practices@servicenow.com.

Appendix

Key performance indicators

To assess your progress at building an effective onboarding service, measure the following KPIs:

- # of measurable business objectives identified – You're not looking for volume but for key objectives that align with your corporate priorities.
- # of low-effort, high-impact onboarding activities identified for automation in ServiceNow – Again, you're not looking for volume but for progress in identifying activities of the service that will bring you quick value.

Stakeholder management

Use this chart to identify which stakeholders need to be responsible and/or accountable, and who should be consulted and/or informed

Responsible/accountable stakeholders	Consulted/informed stakeholders
<ul style="list-style-type: none"> • Now Platform owner • Onboarding team • Service owner • Process owners 	<ul style="list-style-type: none"> • CHRO/CPO • Business leadership • HR business partners • IT operations • Hiring managers • New hires (inform only) • Vendor representatives (inform only) • Partners
Key communications <ul style="list-style-type: none"> • Communicate the business objectives. • Communicate your service definition. • Communicate the importance of understanding existing onboarding processes. • Create awareness around the onboarding service. 	Key communications <ul style="list-style-type: none"> • Seek feedback on the onboarding experience. • Communicate the availability of training. • Communicate the value of building a better enterprise onboarding service.

Related resources

- [ServiceNow Product Documentation – Enterprise Onboarding and Transitions](#)
- [HR lifecycle events 101 – What are they and how do you configure them?](#)
- [K19 Presentation – American Express GBT: Creating the next-gen employee experience for new hire onboarding](#)
- [Webinar – American Express GBT: Creating the Next Generation Employee Experience for New Hire Onboarding](#)

- [ServiceNow Community webinar – Ask the Expert: HR Service Delivery – Advanced Configurations for Lifecycle Events](#)
- [Webinar – How McAfee's HR and IT teams take onboarding to the next level](#)
- [Customer profile – Asurion turns employee onboarding into a competitive advantage among insurers](#)
- [SHRM blog – Onboarding Mistakes to Avoid and Some Creative Ideas to Adopt](#)