

# PRE-BOARDING AND ONBOARDING

A CASE STUDY

OMNIA CONFERENCE | MALMÖ 14-15 NOV.

# AGENDA

- ✓ Introduction
- ✓ Preboarding vs. onboarding
- ✓ Omnia for onboarding
- ✓ The case
- ✓ Q&A

A row of white dominoes is shown against a blue background. The dominoes are arranged in a line, with some standing upright and others falling over. The word "INTRODUCTION" is written in large, white, bold, sans-serif capital letters across the middle of the image.

# INTRODUCTION

## ABOUT ME

- ✓ Robert Lindgren
- ✓ Microsoft 365 / Power Platform
- ✓ + 10 years experience of SharePoint implementations
- ✓ Delivered Omnia to numerous customers





# **PREBOARDING VS. ONBOARDING**

## PREBOARDING

## ONBOARDING



Contract signed

First day on new job

# PREBOARDING VS ONBOARDING

	Preboarding	Onboarding
Timing	Before the employee starts	When the employee starts

# PREBOARDING VS ONBOARDING

	Preboarding	Onboarding
Timing	Before the employee starts	When the employee starts
Purpose	Make the new employee feel welcome. Setting the stage for a smooth onboarding.	Training. Introduction. Integration in culture. Provide tooling.



# PREBOARDING VS ONBOARDING

	Preboarding	Onboarding
<b>Timing</b>	Before the employee starts	When the employee starts
<b>Purpose</b>	Make the new employee feel welcome. Setting the stage for a smooth onboarding.	Training. Introduction. Integration in culture. Provide tooling.
<b>Activities (examples)</b>	Send welcome email. Set up IT systems. Order equipment. Share policies and guidelines.	Orientation sessions. Role-specific training. Check-ins and feedback sessions. Introduction to key personnel.

# PREBOARDING VS ONBOARDING

	Preboarding	Onboarding
<b>Timing</b>	Before the employee starts	When the employee starts
<b>Purpose</b>	Make the new employee feel welcome. Setting the stage for a smooth onboarding.	Training. Introduction. Integration in culture. Provide tooling.
<b>Activities (examples)</b>	Send welcome email. Set up IT systems. Order equipment. Share policies and guidelines.	Orientation sessions. Role-specific training. Check-ins and feedback sessions. Introduction to key personnel.
<b>Duration</b>	Short – from signing contract to start date.	Long – from start date to several months.



# OMNIA FOR ONBOARDING



- Introduction to Alameda Group ▾
- Employee Acquisition and Integration ▾
  - Recruitment process
  - Onboarding of new employees** ▾
    - Pre-boarding of new employees
    - Orientation
    - Introduction
    - Skills Development
  - Employee benefits
  - Employee Termination
- Employee Management ▾
- Employee Policies ▾
- Legal Compliance ▾
- Communication ▾
- Business Operations ▾



## Onboarding of new employees

This chapter covers essential topics such as orientation, training, mentoring, and socialization, and offers practical tips for implementing an effective onboarding program.

Onboarding is the process of integrating new employees into the company culture and preparing them for their role.

### The four phases of onboarding

Alameda Group has divided the onboarding process into four phases: pre-boarding, orientation, introduction, and skills development.

- Pre-boarding: This phase occurs before the employee's first day of work and involves the necessary paperwork, such as employment contracts, confidentiality agreements, and tax forms. Pre-boarding may also include sending new employees a welcome

SEND FEEDBACK

**Information**

**Page Contact**  
 John Faulkner

**Modified**  
a few seconds ago

**Modified By**  
 Robert Johnson

**Applies to**  
Managers





# Employee onboarding portal



## Welcome to Alameda!

Here at Alameda you have the freedom to shape your future while you involve differences and learning from colleagues. We encourage you to explore the endless possibilities to make an influence in this dynamic organization.

It is time to explore Alameda and we know that your first 90 days are important. To support you travel, we have prepared some onboarding systems below.



ONBOARDING TUTORIAL

### Your on-boarding

Orientation (First week)

### Your profile

36% done

STRENGTHEN PROFILE

### New at Alameda



#### Orientation (First week)

During the upcoming weeks and months, we hope that you will benefit from our smooth onboarding process and soon will be a part of the Alameda Family.

- Introduction to culture and values
- Overview of policies and procedures
- Products, services, and markets
- Virtual tour of company facilities



#### Introduction (First month)

During Introduction, you'll have the chance to ask questions and gain a deeper understanding of the company's mission, vision, and values. We want you to feel welcomed and empowered for the new job.

- Our objectives and strategies
- Learn about our organization
- Overview of Product Portfolio
- Sales and marketing overview



#### Skills development (First quarter)

The Skills Development phase is designed to help you feel confident and equipped to take on your responsibilities, make a positive impact in your role, and help develop our business.

- Mentorship Program
- Job rotation
- Learning tracks and micro-courses
- Develop product knowledge

**Camilla Harris**  
 Hire Date : April 4, 2023  
 Role : Maintenance Manager  
 Location : Denver  
 Organization : Maintenance

✉️ 💬 📞



ONBOARDING PORTAL - TUTORIAL



Employee onboarding portal

New Employee Introduction

Watch on YouTube

Orientation (First week)

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Welcome to Alameda Group - let's get you up to speed!

During the upcoming weeks and months, we hope that you will benefit from our smooth onboarding process and soon will be a part of the Alameda Family. The process is divided into three phases and first we would like you to get oriented with the company, your team and manager, our high-quality products, and where we are heading as an organization.

You have received a Sign-off Request from you manager that will help you navigate your first working week.

Progress indicator: 1 of 5 steps completed

**CLOSE**

vision, and values. we want you to feel welcomed and empowered for the new job.

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ONBOARDING TUTORIAL

- our on-boarding
- Orientation (First week)

ur profile

% done

STRENGTHEN PROFILE

w at Alameda



Camilla Harris

Hire Date : April 4, 2023

Role : Maintenance Manager

Location : Denver

Organization : Maintenance





# Employee onboarding portal



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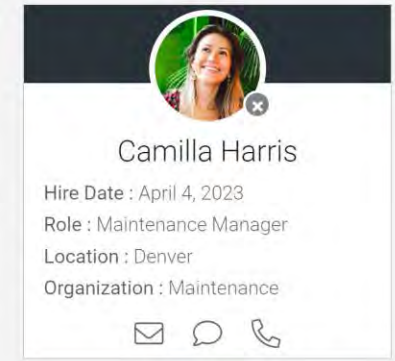
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**Camilla Harris**  
 Hire Date : April 4, 2023  
 Role : Maintenance Manager  
 Location : Denver  
 Organization : Maintenance

✉️ 💬 📞




# ONBOARDING PORTAL – STRENGTHEN USER PROFILE



## Employee onboarding portal



During the upcoming weeks and months, we hope that you will benefit from our structured onboarding process and soon will be a part of the Alameda Family.

- Introduction to culture and values
- Overview of policies and procedures
- Products, services, and markets
- Virtual tour of company facilities

understanding of the company's mission, vision, and values. We want you to feel welcomed and empowered for the new job.

- Our objectives and strategies
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on your responsibilities, make a positive impact in your role, and help develop our business.

- Mentorship Program
- Job rotation
- Learning tracks and micro-courses
- Develop product knowledge

### Strengthen your profile

A rich profile is more fun. It will help the system to target information to you and for your colleagues to get to know who you are.

36% done


1 About You | 2 Organization | 3 Competence and Skills | 4 Interests | 5 Local News Subscription

Please describe yourself and upload a new profile photo if you are not happy about the official one.

About You

**B** *I* U

I love hiking, mountain biking, and the challenges of black downhill slopes. So excited to work at the greatest bike company around! Based on our Gothenburg office.

 [Change Image](#)

[Next >](#) [Save and Close](#)

### ONBOARDING TUTORIAL

Onboarding

Orientation (First week)

Profile

### STRENGTHEN PROFILE

Alameda



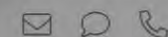
Camilla Harris

Start Date: April 4, 2023

Job Title: Maintenance Manager

Location: Denver

Organization: Maintenance





# ONBOARDING PORTAL – STRENGTHEN USER PROFILE



## Employee onboarding portal

New Employee Introduction

Watch on YouTube

Orientation (First week)

- During the upcoming weeks and months, we hope that you will benefit from our smooth onboarding process and soon will be a part of the Alameda Family.
- Introduction to culture and values
- Overview of policies and procedures
- Products, services, and markets
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- ask questions and gain a deeper understanding of the company's mission, vision, and values. We want you to feel welcomed and empowered for the new job.
- Our objectives and strategies
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A rich profile is more fun. It will help the system to target information to you and for your colleagues to get to know who you are.

36% done

1 About You | 2 Organization | 3 Competence and Skills | 4 **Interests** | 5 Local News Subscription

Select topics that you are interested in and we will suggest communities that could be of interest for you.

Topics

pro

- Improvement
- Processes
- Product Portfolio
- Project Management

[< Previous](#) [Next >](#) [Save and Close](#)

### ONBOARDING TUTORIAL

- Onboarding
- Orientation (First week)

### file

### STRENGTHEN PROFILE

### Alameda

**Camilla Harris**  
Joined: April 4, 2023  
Title: Maintenance Manager  
Location: Denver  
Organization: Maintenance



### Employee onboarding portal



#### Welcome to Alameda!

Here at Alameda you have the freedom to shape your future while you involve differences and learning from colleagues. We encourage you to explore the endless possibilities to make an influence in this dynamic organization.

It is time to explore Alameda and we know that your first 90 days are important. To support you travel, we have prepared some onboarding systems below.

#### ONBOARDING TUTORIAL

#### Your on-boarding

Orientation (First week)

#### Your profile

55% done

STRENGTHEN PROFILE

#### New at Alameda



Camilla Harris

Hire Date : April 4, 2023

Role : Maintenance Manager

Location : Denver

Organization : Maintenance



#### Orientation (First week)

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- Introduction to culture and values
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# ONBOARDING PORTAL – INSTRUCTIONS FOR EMPLOYEE

The screenshot shows the Alameda One onboarding portal. At the top, there is a navigation bar with the Alameda One logo and a search bar. Below the navigation bar, the main heading is "Employee onboarding portal". A modal window is open, displaying the "Introduction to culture and values" section. The modal contains a video player with a play button and a "Watch on YouTube" link. The text in the modal reads: "As a new member of our team, it's important that you understand our company culture and values. Welcome to Alameda! As a new member of our team, it's important that you understand our company culture and values. We believe that our culture is the foundation of our success, and we strive to create a positive and supportive work environment for all of our employees. At Alameda, our core values include: Customer Focus One of our core values is to put our customers first. As an employee, this means that you should always prioritize the needs of our customers in your work. For example, if a customer contacts you with a problem or concern, you should listen attentively, empathize with their situation, and take steps to resolve the issue as quickly and effectively as possible. By embodying this value, you can help to build strong relationships with our customers and ensure that they are satisfied with our products and services. Teamwork". The background of the portal is dimmed, showing a list of onboarding topics and a user profile for Camilla Harris.

ALAMEDA ONE

ABOUT ALAMEDA | OUR ORGANIZATION | HOW WE WORK | INTERNAL SUPPORT | PRODUCTS AND SERVICES | NEWS

## Employee onboarding portal

### New Employee Introduction

### Introduction to culture and values

Watch on YouTube

VIEW →

As a new member of our team, it's important that you understand our company culture and values.

Welcome to Alameda! As a new member of our team, it's important that you understand our company culture and values. We believe that our culture is the foundation of our success, and we strive to create a positive and supportive work environment for all of our employees.

At Alameda, our core values include:

**Customer Focus**

One of our core values is to put our customers first. As an employee, this means that you should always prioritize the needs of our customers in your work.

For example, if a customer contacts you with a problem or concern, you should listen attentively, empathize with their situation, and take steps to resolve the issue as quickly and effectively as possible. By embodying this value, you can help to build strong relationships with our customers and ensure that they are satisfied with our products and services.

**Teamwork**

ONBOARDING TUTORIAL

our on-boarding

Orientation (First week)

profile

done

STRENGTHEN PROFILE

Work at Alameda

Camilla Harris

Hire Date: April 4, 2024

Role: Marketing Manager

Location: Denver

Organization: Marketing

✉️ 💬 📄

# STRUCTURED SCHEDULES FOR ONBOARDING

Q Search

General Posts Files Wiki Sign-off requests

## Sign-off requests

CREATE REQUEST

Q Search...

Progress Status Type

Title	Type	Request sent to	Requested	Requested by	Progress Status
Orientation (First week)	Onboarding	Allan Tanner	2023-10-12	Robert Johnson	Not Started

Corporate Communication  
General



# STRUCTURED SCHEDULES FOR ONBOARDING

The screenshot displays the Microsoft Teams interface. On the left is the navigation pane with various team channels. The main area shows the 'General' channel of a team named 'Sign-off requests'. A table lists existing requests, and a 'New Sign-off Request' dialog is open on the right.

**Sign-off requests Table:**

Title	Type	Request sent to	Requested
Orientation (First week)	Onboarding	Allan Tanner	2023-10-12

**New Sign-off Request Form:**

- Template:** Onboarding - Orientation
- Name:** Orientation (First week)
- Description:** Welcome to Alameda! Let's get you onboard. Here is a checklist to help you get settled. Please make sure that you have finished it before the end of your first work week.
- To be signed off:**
  - Introduction to culture and values
  - Overview of policies and procedures
  - Products, services, and markets
  - Virtual tour of company facilities
  - Benefits and compensation
  - Meet the Alameda Family
- Requested by:** Robert Johnson
- Request sent to:** Anna Karlsson
- Button:** SEND REQUEST

## Employee onboarding portal



### Welcome to Alameda!

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ONBOARDING TUTORIAL

### Your on-boarding

Orientation (First week)

### Your profile

55% done

STRENGTHEN PROFILE

### New at Alameda



Camilla Harris

Hire Date : April 4, 2023

Role : Maintenance Manager

Location : Denver

Organization : Maintenance



### Orientation (First week)

During the upcoming weeks and months, we hope that you will benefit from our smooth onboarding process and soon will be a part of the Alameda Family.

- Introduction to culture and values
- Overview of policies and procedures
- Products, services, and markets
- Virtual tour of company facilities



### Introduction (First month)

During Introduction, you'll have the chance to ask questions and gain a deeper understanding of the company's mission, vision, and values. We want you to feel welcomed and empowered for the new job.

- Our objectives and strategies
- Learn about our organization
- Overview of Product Portfolio
- Sales and marketing overview



### Skills development (First quarter)

The Skills Development phase is designed to help you feel confident and equipped to take on your responsibilities, make a positive impact in your role, and help develop our business.

- Mentorship Program
- Job rotation
- Learning tracks and micro-courses
- Develop product knowledge





# STRUCTURED SCHEDULES FOR ONBOARDING



<< ONBOARDING PORTAL



## Introduction to culture and values

As a new member of our team, it's important that you understand our company culture and values.

Welcome to Alameda! As a new member of our team, it's important that you understand our company culture and values. We believe that our culture is the foundation of our success, and we strive to create a positive and supportive work environment for all of our employees.

At Alameda, our core values include:

### Customer Focus

One of our core values is to put our customers first. As an employee, this means that you should always prioritize the needs of our customers in your work.

For example, if a customer contacts you with a problem or concern, you should listen attentively, empathize with their situation, and take steps to resolve the issue as quickly and effectively as possible. By embodying this value, you can help to build strong relationships with our customers and ensure that they are satisfied with our products and services.

## Orientation (First week)

Requested by: **Robert Johnson**

Requested: **2023-10-23**

Request sent to: **Anna Karlsson**

Description:

**Welcome to Alameda! Let's get you onboard. Here is a checklist to help you get settled. Please make sure that you have finished it before the end of your first work week.**

To be signed off

- Introduction to culture and values**  
Signed-off by Anna Karlsson at 2023-10-23
- Overview of policies and procedures**  
I know where to find important policies and procedures.
- Products, services, and markets**  
I have a general understanding of our offering.
- Virtual tour of company facilities**  
I have taken the virtual tour of company facilities.
- Benefits and compensation**  
I know which benefits and compensation that applies to me.
- Meet the Alameda Family**  
I have watched the video about the Alameda Family.



# STRUCTURED SCHEDULES FOR ONBOARDING

The screenshot shows the Microsoft Teams interface. On the left is a navigation pane with various icons and team names. The main area displays a 'General' channel with a 'Sign-off requests' tab selected. A 'CREATE REQUEST' button is visible in the top right of the channel. Below the channel header is a search bar and filter options for 'Progress Status' and 'Type'. A table lists the requests:

Title	Type	Request sent to	Requested	Requested by	Progress Status
Orientation (First week)	Onboarding	Anna Karlsson	2023-10-23	Robert Johnson	In Progress
Orientation (First week)	Onboarding	Allan Tanner	2023-10-12	Robert Johnson	Not Started

A pink arrow points to the first row of the table. The 'Progress Status' column uses colored circles: a yellow circle for 'In Progress' and a white circle for 'Not Started'.

# THE CASE

## THE CASE

- ✓ Customer wants to handle preboarding and onboarding better
- ✓ Preboarding takes a long time
- ✓ Collecting information and internal alignment
- ✓ Wants employees to feel that they are joining a company that works in modern ways, and utilizes the latest technology





## THE CASE

- ✓ Save time and adhere to GDPR
- ✓ Reduce errors and make the process more robust
- ✓ Agile implementation with sprints
  - ✓ New functionality is “released to the business” after each sprint
  - ✓ Next sprint is planned at the end of the previous



# GOAL – HIGH LEVEL



## CURRENT STATE

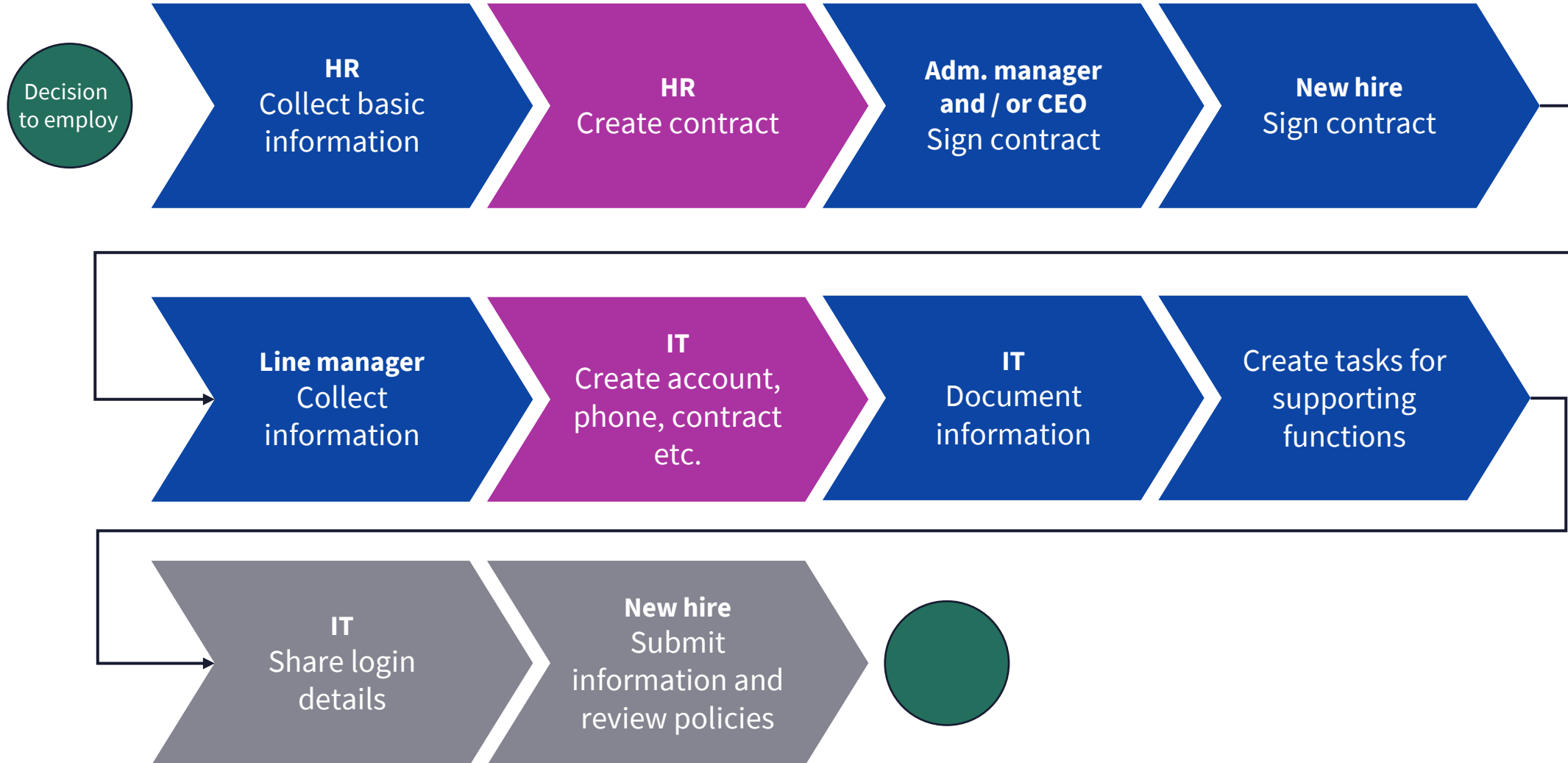
- ✓ 3 sprints delivered.
- ✓ Sprint 1: E-sign of contract.
- ✓ Sprint 2: Collecting information about the employee.
- ✓ Sprint 3: Creating tasks for supporting functions.



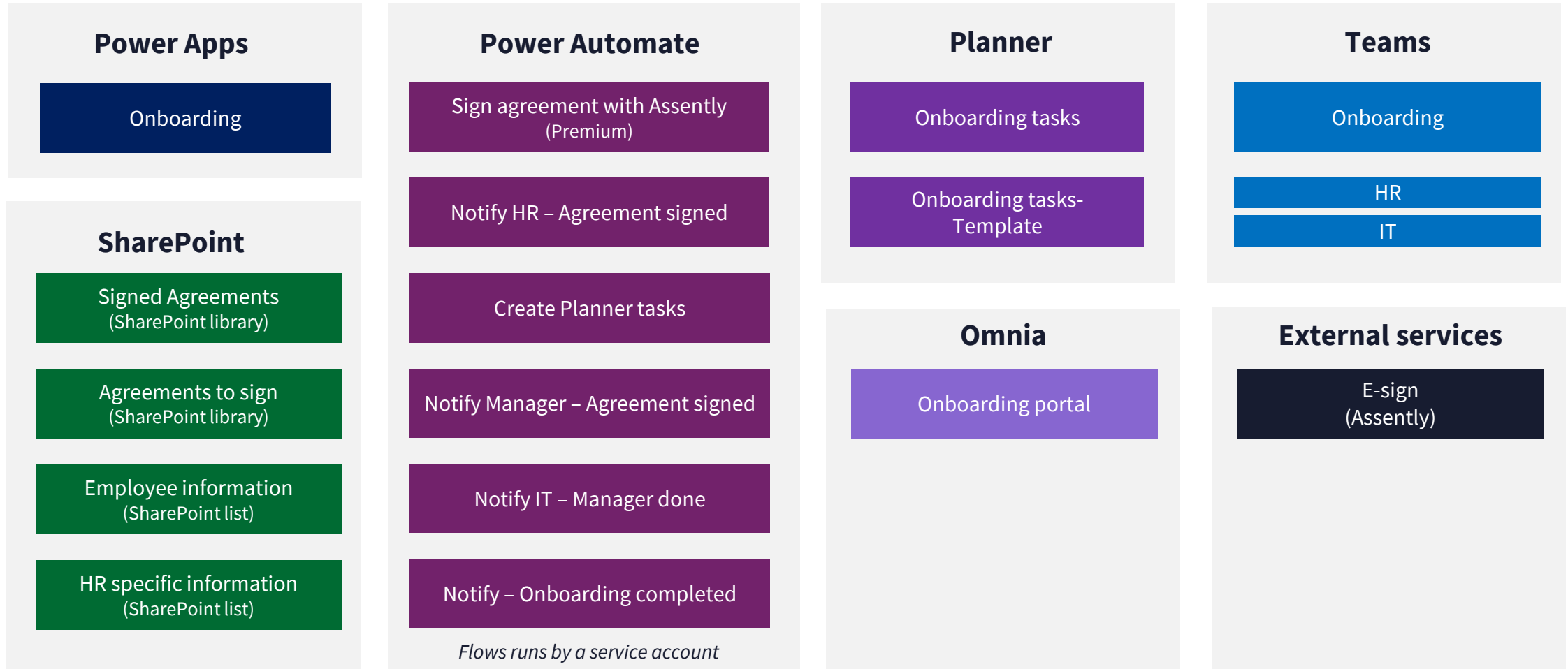


# CURRENT STATE

- Digitalized
- Manual
- Not started







# SOLUTION ARCHITECTURE




## Pågående processer

[Starta ny onboarding](#)




Namn	Väntar på (Status)	Senast ändrad	
 Anders Testare	IT	2023-10-10 13:45	
 Test Testaren	Signering	2023-10-10 13:07	

[Visa avslutade](#)

[Uppdatera](#) 



## Pågående processer

[Starta ny onboarding](#) 

Namn

Anders Testare

Test Testaren

### Skapa ny onboarding

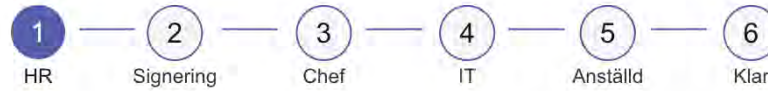
Förnamn

Demo

Efternamn

Testingsson

Skapa



**Förnamn**

Demo

**Efternamn**

Testingsson

**E-postadress**

demo@testingsson.se

**Telefonnummer**

07011223344

**Hemadress**

No Name Street  
123 45 Town

**Anställningsform**

Välj anställningsform

Provanställning

Särskild visstidsanställning


Tillsvidareanställd

Vikariat

**Avtal**

Ingen fil vald

Ladda upp

 Välj fil

**Juridiskt bolag**



**Arbetsställe**

Välj arbetsställe



**Kostnadsställe**

[Öppna i SharePoint](#)

[Öppna uppgifter i Planner](#)

Tillbaka

Spara

Skicka för signering



Förnamn

Demo

Efternamn

Testingsson

E-postadress

demo@testingsson.se

Telefonnummer

07011223344

Hemadress

No Name Street  
123 45 Town

Anställningsform

Provanställning

Anställningsdag

January 1, 2024

Befattning

Assistent

Närmsta chef

Avtal

Appendix 1.d... Unsa... X

Ladda upp

Juridiskt bolag

Arbetsställe

Välj arbetsställe

Kostnadsställe

[Öppna i SharePoint](#)

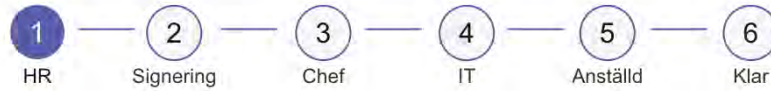
[Öppna uppgifter i Planner](#)

Tillbaka

Spara

Skicka för signering





Förnamn

Demo

Efternamn

Testingsson

E-postadress

demo@testingsson.se

Telefonnummer

07011223344

Hemadress

No Name Street  
123 45 Town

Anställningsform

Provanställning

Anställningsdag

January 1, 2024

Befattning

Assistent

Närmsta chef

Avtal

Anställningsavtal har laddats  
upp  
[Öppna avtalet](#)

Ta bort

Juridiskt bolag

Avdelning

Enhet

Arbetsställe

Malmö

Kostnadsställe

12345

Avtalstecknare

För det valda bolaget krävs två avtalstecknare.

[Öppna i SharePoint](#)

[Öppna uppgifter i Planner](#)

Tillbaka

Spara

Skicka för signering

E-sign <no-reply@assently.com> Fre 2023-09-01 10:19

Till: [Redacted]

Hej [Redacted],  
[Redacted] har skickat ett dokument till dig för undertecknande.

**Anställningsavtal -**  
Undertecknas av: [Redacted]

[Granska och underteckna](#)

Powered by Assently

[← Svara](#) [→ Vidarebefordra](#)

## Anställningsavtal - är undertecknat

Hej

Dokumentet har undertecknats. Spara det här mejlet om du vill hitta tillbaka i framtiden.



**Anställningsavtal -**  
Undertecknat av: [Redacted]

[Visa detaljer](#) [Ladda ner](#)

## Ladda ner det undertecknade dokumentet

Det undertecknade dokumentet finns att hämta från Assently. Du kan ladda ner det och arkivera det själv på ett sätt som är lämpligt för dig.

## Verifiera handling

Du kan när som helst försäkra dig om att handlingen inte förändrats sedan den undertecknades.

[Verifiera handling](#)



## Ny onboarding uppgift



Fre 2023-09-01 10:21

Hej [redacted]

Nu har Robert Lindgren undertecknat sitt anställningsavtal och det är dags för dig att hantera vissa uppgifter i onboarding-portalen.

Vi ber dig därför så snart som möjligt ange:

- om medarbetaren ersätter någon, och i så fall vem,
- medarbetarens sökord i växeln,
- andra eventuella önskemål.

Här anger du uppgifterna i [onboarding-portalen >>](#)

Tänk på att det ibland förekommer längre leveranstider av teknisk utrustning, så vi uppskattar om du prioriterar detta. För att vi ska kunna avsluta förberedelserna behöver vi din respons senast den 2023-09-08 .

Normalt finns nya medarbetares användarkonto tillgängliga 1-2 veckor innan första anställningsdag. Om behov finns för att kontot ska vara tillgänglig tidigare än så eller om ni önskar någon särskild utrustning anger du det redan nu i fältet "önskemål".

Om du har några frågor kring onboarding-processen kontaktar du i första hand [redacted] på HR.

Med Vänliga Hälsningar,  
[redacted]

← Svara

→ Vidarebefordra



**Förnamn**

Demo

**Efternamn**

Testingsson

**Anställningsdag**

**Befattning**

**E-postadress**

**Telefonnummer**

**Ersättare för**

**Sökord i växeln**

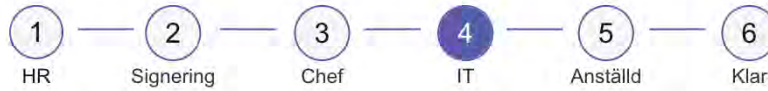
**Önskemål**

Fyll i om den anställde har några särskilda önskemål, t.ex. Mac-dator eller att behålla sitt befintliga mobiltelefonnummer

Tillbaka

Spara

Klarmarkera sektion



**Förnamn**

Demo

**Efternamn**

Testingsson

**E-postadress**

**Telefonnummer**

**Användarnamn**

**E-postadress (TE)**

**Mobilnummer (TE)**

**Direktnummer (TE)**

[Öppna uppgifter i Planner](#)


Tillbaka


Spara

Klarmarkera sektion

Skicka IT:s informationsmail



Onboarding-uppgifter 

Grid Board Charts Schedule  Timeline ...

To do + Add task

Demo Testingsson Add new bucket

+ Add task

- IT  
🕒 0 / 5
- HR  
🕒 0 / 2
- Ekonomi  
🕒 0 / 2

Onboarding-uppgifter

IT  
Last changed moments ago by you

Assign

Add label

Bucket: Demo Testingsson

Progress:  Not started

Priority: • Medium

Start date: Start anytime

Due date: Due anytime

Repeat: Does not repeat

Notes  Show on card

Uppdatera informationen kontinuerligt i Onboarding-appen. Klarmarkera sektionen när IT:s uppgifter är fullt ifyllda.

Checklist 0 / 5  Show on card

- 1. Skapa användarkonto
- 2. Lägg till konto i AD-grupp.
- 3. Beställ dator
- 4. Beställ mobiltelefon
- 5. Beställ tillbehör
- Add an item

Attachments

Comments

# CURRENT STATE

- Digitalized
- Manual
- Not started

Decision to employ





**ANY QUESTIONS?**

omnia