
Standard Operating Procedure: Global Employee Onboarding (G-OB-001)

Company: Apex Global Solutions (AGS)
Department: Global People Operations & Enterprise IT
Process Owner: Sarah Connor, VP of People Operations
Technical Owner: Miles Dyson, CIO
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1. Executive Summary & Strategic Intent

This document defines the end-to-end lifecycle for onboarding new talent at Apex Global Solutions (AGS).
Strategic Goal: To reduce "Time-to-Productivity" (TTP) from 45 days to 21 days while ensuring 100% compliance with local labor laws and data security standards.
Philosophy: We utilize a "Zero Trust" IT security model combined with a "High Touch" cultural integration approach.

2. Roles & Responsibilities (RACI Matrix)

This matrix defines who is Responsible (R), Accountable (A), Consulted (C), and Informed (I) for key steps.

Activity	Hiring Manager (Jane Smith)	HR Ops (Recruiter)	IT Service Desk	New Hire (John Doe)	Buddy (Michael Chen)
Contract Generation	I	R	I	C	I
Hardware Provisionin	C	I	R	I	I

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Account Activation (Okta)	I	I	A	R	I
Cultural Immersion	A	C	I	R	R
SaaS Access (Salesforce)	I	I	R	R	C
Probation Review	R	A	I	I	C

3. Technology Ecosystem & Data Flow

The onboarding process is an automated chain reaction across our tech stack.

1. **Workday (HCM):** The "Source of Truth." Record creation here triggers the UUID (Universal Unique Identifier).
2. **Okta (Identity):** Consumes UUID from Workday. Provisions Active Directory and SSO.
3. **ServiceNow (Orchestration):** The interaction layer. Triggers workflows for hardware shipping and facilities.
4. **Salesforce (Commercial):** Consumes user data to assign Territory IDs and Licenses.
5. **Zapier/Mulesoft (Middleware):** connects Workday to Slack for automated channel invites.

4. Phase 1: Pre-Boarding (The "Silent" Phase)

Period: Offer Acceptance to Day 0

4.1 Background & Security Vetting (T-20 Days)

- **Trigger:** Offer Letter signed in DocuSign.
- **Action:** HR Ops initiates background check via **HireRight** integration.
- **Scope:**
 - Criminal History (Global).

- Adverse Media Check (for Director+ roles).
- Sanctions List (OFAC/terrorist watchlists).
- **Outcome:** "Clearance Certificate" attached to Workday Profile.

4.2 Automated Identity Provisioning (T-14 Days)

- **System Action:** Workday pushes new hire metadata to **Okta**.
- **Data Fields:** FirstName, LastName, JobCode, CostCenter, Location.
- **Email Generation Logic:**
 - Format: firstname.lastname@apexglobal.com
 - *Conflict Handling:* If john.doe exists, system auto-appends incremental integer: john.doe2@apexglobal.com.

4.3 Hardware Logistics (T-10 Days)

- **ServiceNow Workflow:** "New Hire Asset Request" ticket auto-created.
- **Profile:** Sales Representative (Remote/Hybrid).
- **Asset Bundle (SKU: SALES-STD-25):**
 - Laptop: Dell XPS 15 (Asset Tagged).
 - Mobile: iPhone 15 Pro (Managed by Intune).
 - Peripherals: Jabra Evolve2 Headset, Privacy Screen.
- **Shipping:** UPS tracking number generated and emailed to John Doe's personal email.

4.4 The "Culture Prime" Portal (T-7 Days)

- **Access:** John receives a "Magic Link" (passwordless) to the **ServiceNow Pre-Boarding Hub**.
- **Mandatory Task:** Upload Headshot for Badge.
 - *Criteria:* White background, face forward.
 - *AI Validation:* ServiceNow AI validates image quality before accepting.

5. Phase 2: Day 1 (The "Zero Day")

Focus: Physical Access, Digital Identity, and Safety.

5.1 Physical Access & Biometrics (08:30 AM)

- **Location:** AGS New York Hub, Reception.
- **Action:** John presents Government ID (Passport/Driver's License).
- **Badging:** Reception prints badge using the photo uploaded in Phase 1.
- **Access Control:** Badge encoded with "General Employee Access" (Turnstiles, Cafeteria, Floor 4).
 - *Restriction:* Server Room and Legal Archives access remains **Blocked**.

5.2 Digital "Handshake" (09:00 AM)

- **Step 1:** John powers on the Dell XPS.
- **Step 2 (Autopilot):** Windows Autopilot detects the hardware ID.
- **Step 3:** Login using temporary credentials provided in the "Welcome Email."
- **Step 4 (MFA):** Forced enrollment in **Okta Verify**.
 - *Policy:* SMS authentication is **disabled** due to SIM-swapping risks. Push notification only.

5.3 The ServiceNow "Day 1 Checklist"

John logs into **ServiceNow Employee Center**. The following tasks are flagged as "Overdue" if not completed by 5:00 PM:

1. **Emergency Contact Update:** Update Next of Kin in Workday.
2. **I-9 Verification (US Only):** Meet with HR Ops (Sarah Connor) to verify work eligibility docs.
3. **Acceptable Use Policy (AUP):** Digital signature required.
4. **Slack Setup:** Verify entry into channels #sales-all and #nyc-office.

6. Phase 3: The First Week (Operational Readiness)

6.1 Commercial Enablement (Salesforce Focus)

- **Owner:** Sales Operations.
- **Territory Assignment:** John is assigned Territory_ID: NA-EAST-SME.
- **Data Visibility:**
 - *Leads:* View access to all "Open" leads in NY Metro.
 - *Accounts:* "Read-Only" access to Enterprise Accounts (to prevent accidental edits).
- **Sandbox Training:** John must create 5 dummy "Opportunities" in the **Apex-Training-Sandbox**.
 - *Success Metric:* Conversion of a dummy lead to "Closed-Won" without error messages.

6.2 The "Buddy" Charter (Michael Chen)

- **Role:** The Buddy is a peer, not a manager.
- **Commitment:** 30 Days.
- **Day 2 Task:** "Coffee & Systems." Michael shows John how to use the printer, book meeting rooms via the app, and navigate the Intranet.
- **Day 5 Task:** "The Social Lunch." Michael introduces John to 3 people outside the immediate sales team.

6.3 Finance & Expenses (SAP Concur)

- **Corporate Card:** John activates his Amex Corporate Green Card.
 - **Concur Config:**
 - Expense Approver is hardcoded to Manager (Jane Smith).
 - *Policy Flag:* System alert set for any expense > \$50 without a receipt.
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7. Phase 4: Extended Onboarding (Month 1-3)

7.1 Data Privacy & GDPR Training (Week 2)

- **Platform:** Cornerstone LMS.
- **Module:** "Handling PII and Customer Data at AGS."
- **Assessment:** John must score 80%+ on the quiz to unlock "Export Data" privileges in Salesforce.

7.2 Performance Goals (OKRs)

Jane Smith sets the following goals in Workday for the first 90 days:

1. **Learning:** Complete "Challenger Sales Model" certification.
2. **Activity:** Log 50 outbound calls in Salesforce.
3. **Pipeline:** Generate \$10k in new pipeline.

7.3 The 30-Day Health Check

- **Mechanism:** Automated ServiceNow Survey.
 - **Question:** "Do you have the tools and resources to do your job?"
 - **Trigger:** If John answers "No" or "Neutral," a ticket is raised to **HR Business Partner** for intervention.
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8. Operational Support: "Hypercare" Protocol

Definition: Enhanced support status for new joiners.

8.1 The "New Hire" Flag

- **Duration:** First 21 Days.
- **ServiceNow Behavior:**
 - Tickets raised by John Doe are highlighted in **Gold** on the Agent Dashboard.
 - Chatbot "Apex-Bot" routes John directly to a human agent, bypassing the standard deflection script.

8.2 Common Escalation Scenarios

Issue	Troubleshooting Step	Escalation Owner
"I can't see my Leads in Salesforce"	Check "Role Hierarchy" in User Profile.	Sales Ops Admin
"VPN is rejecting my connection"	Verify Zscaler Client is running.	Network Security
"I didn't get my paycheck"	Verify Bank Routing # in ADP.	Payroll Manager

9. Metrics & Governance

How we measure the success of this SOP.

Metric	Definition	Target	Data Source
Time-to-Productivity	Days from Start Date to first Salesforce Deal > \$1.	< 21 Days	Salesforce
Day 1 Readiness	% of new hires with working laptop & email on arrival.	99%	ServiceNow
Onboarding NPS	Employee satisfaction score at Day 30.	> 60	Qualtrics
Ticket Volume	Avg IT tickets raised per new hire in Week 1.	< 2	ServiceNow

10. Appendices & Templates

Appendix A: Glossary of Terms

- **SSO:** Single Sign-On (One password for all apps).
- **MFA:** Multi-Factor Authentication (Password + Phone Code).
- **SLA:** Service Level Agreement (Deadline to fix an issue).
- **PII:** Personally Identifiable Information (Data that needs protection).

Appendix B: Sample "Welcome Email" (Automated)

From: IT Provisioning (no-reply@apexglobal.com)

Subject: 🗝️ Action Required: Your Digital Keys for Day 1

Dear John Doe,

Your digital workspace is ready.

1. Credentials:

- **Username:** john.doe
- **Temp Password:** Welcome2025!Apex (Expiring in 24 hours)

2. First Login:

Go to <https://login.apexglobal.com>. You will be prompted to scan a QR code with your phone.

3. Need Help?

Call the Service Desk at x5555 or email help@apexglobal.com (from your personal email if locked out).

Regards,

AGS IT Operations

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