



Understand Your Automation 'Why'

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Overall Business Goals (This is Your Automation 'Why')

Current Challenges

Our employee onboarding process is inefficient and error-prone. HR manually enters data, then IT and Finance re-enter the same information. We face lengthy waiting periods between handoffs, excessive email communication, and coordination issues across departments.

Business Goals (to address these challenges)

We need to accelerate operations, improve responsiveness, and ensure consistent results. By automating our employee onboarding process, we aim to maintain security and compliance while freeing our staff for strategic work.

Success Metrics (What You Hope to Achieve)

Your Current Metrics (ie Error Rates, Time Spent, etc)

Our employee onboarding takes 3-5 days from start to finish. Each department spends about 2-3 hours per new hire on manual data entry. We experience a 15% error rate due to duplicate entries, and our HR team dedicates roughly 40 hours monthly just coordinating between departments.

Your Target Metrics

We aim to reduce onboarding time from days to hours, cutting the process by 75%. We expect to decrease manual data entry by 90% and virtually eliminate errors from duplicate entries. This should free up approximately 30 hours monthly for our HR team and significantly improve employee satisfaction.

Your Future State (What Success Looks Like)

Describe how you want your processes to operate with automation. What is your ideal future state? (reduce processing time, eliminate duplicate entries)

We envision a streamlined onboarding process where data is entered once by HR and automatically flows to IT and Finance systems. We'll eliminate duplicate data entry, reduce processing time by 75%, and create a consistent experience for new hires.