ILLUSTRATIVE WORK SAMPLE

AUTOMATED EMPLOYEE ONBOARDING WORKFLOW

A controlled, welcoming, and measurable journey from accepted offer through demonstrated role readiness.

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WORKFLOW LENS

Ownership | Automation | Experience | Controls | Readiness

PURPOSE

Convert an accepted offer into a controlled, welcoming, and measurable onboarding experience - without relying on manual reminders or institutional memory.

PORTFOLIO CONTEXT

This illustrative work sample demonstrates a generic workflow architecture, control framework, and implementation approach. Final configuration, timing, owners, forms, and integrations would be validated against the organization's actual technology, roles, policies, and operating requirements.

WORKFLOW ARCHITECTURE

One Journey, Four Connected Systems

The workflow coordinates people, tasks, information, and evidence from offer acceptance through demonstrated role readiness. Automation removes preventable follow-up while preserving human judgment, welcome, coaching, and accountability.

End-to-End Operating Model

STAGE	PRIMARY OUTCOME	CORE OWNER	CONTROL POINT
1. Offer accepted	Candidate becomes an authorized incoming employee record	HR / People Operations	Approval, role, manager, start date, and terms verified
2. Preboarding	Documents, accounts, equipment, schedule, and welcome steps are ready	HR + Hiring Manager	Readiness gate before Day 1
3. Day 1 & Week 1	Employee is connected, equipped, trained, and clear on expectations	Hiring Manager	Access test, acknowledgments, first-week check
4. Days 8-30	Employee begins producing role-specific work with coaching	Hiring Manager	Observed proficiency and documented feedback
5. Days 31-60	Employee assumes increasing ownership and closes skill gaps	Manager + Employee	Progress review and remediation plan when needed
6. Days 61-90	Readiness is confirmed and onboarding transfers to normal performance cadence	Hiring Manager + HR	90-day decision, evidence, workflow closure

Design Principles

- One employee record initiates one controlled workflow; duplicate entry is minimized.
- Every task has an owner, due date, completion evidence, and escalation path.
- Sensitive data is collected only through approved systems with role-based access.
- Employee-facing communication is timely and welcoming, not robotic or duplicative.
- Completion is not the same as capability; role readiness requires observed proficiency.
- Automation failures surface to a named human owner instead of remaining silent.

SUCCESS STANDARD

The employee, manager, HR owner, and support teams should always know what is complete, what is next, who owns it, and what requires attention.

TRIGGER & DATA CONTROL

The Workflow Begins With a Validated Record

Clean inputs prevent downstream errors in documents, permissions, equipment, payroll, scheduling, and reporting.

Required Launch Fields

DATA GROUP	REQUIRED INFORMATION	VALIDATION / USE
Employee identity	Legal and preferred name, personal contact, location	Document generation, communication, identity setup
Employment terms	Title, classification, status, compensation, start date	Offer alignment, payroll, benefits, reporting
Organization	Department, manager, work location, cost center if used	Routing, access, approvals, analytics
Role setup	Job description, access profile, equipment bundle, training track	Standard task and permission templates
Approvals	Authorized approver, approval timestamp, final offer version	Prevents incomplete or superseded launch
Special conditions	Contingencies, accommodations routing, jurisdictional needs	Restricted, need-to-know tasks without exposing details

Launch Logic

01 Trigger: accepted offer status plus required approval and minimum data fields.
02 System action: create the employee profile and unique onboarding workflow ID.
03 Template selection: apply tasks by role, department, location, manager, classification, and start-date window.
04 Date calculation: assign due dates relative to the confirmed start date and applicable internal deadlines.
05 Owner confirmation: require the hiring manager to validate the role plan, access profile, and first-week schedule.
06 Exception routing: hold the workflow when required data, approvals, contingencies, or start-date certainty are missing.

Data-Change Safeguards

CHANGE	AUTOMATED RESPONSE	HUMAN REVIEW
Start date changes	Recalculate dates; flag completed time-sensitive tasks	Manager and HR confirm revised plan
Manager changes	Reassign open manager tasks and approvals	New manager accepts ownership
Role / location changes	Compare templates and create a delta task list	HR validates classification, access, policy impact
Offer withdrawn / declined	Stop messages and close pending provisioning tasks	HR confirms revocation and retention requirements

PREBOARDING WORKFLOW

Accepted Offer to Day 1 Readiness

The workflow front-loads preparation while keeping personal connection visible.

Preboarding Sequence

WHEN	AUTOMATION / TASK	OWNER	COMPLETION EVIDENCE
Immediately	Send branded welcome and secure employee-information request	HR system	Delivery logged; form submitted
Within 1 business day	Validate documents and initiate payroll / HR system entry	HR	Record verified; exceptions resolved
Within 1 business day	Launch role-specific onboarding plan and manager checklist	Workflow	Template assigned; manager accepts
By configured lead time	Create account, permission, equipment, and facility requests	IT / Operations	Request IDs and assigned owners
3-5 days before	Confirm first-week schedule, trainers, meetings, and materials	Hiring Manager	Schedule and training plan approved
2-3 days before	Send Day 1 instructions, arrival details, contacts, and expectations	HR / Workflow	Message delivered
1 business day before	Run readiness gate across access, equipment, schedule, documents, and owner tasks	HR + Manager	Ready status or active exception plan

Day 1 Readiness Gate

- Employment documentation is complete or has an approved follow-up path.
- Required accounts and permissions are active at the correct access level.
- Equipment is available, configured, and assigned to the employee.
- The manager has a first-week agenda, role priorities, and named support contacts.
- Required training is assigned in an intentional sequence rather than all at once.
- Any unresolved issue has an owner, due time, workaround, and escalation status.

HUMAN MOMENT

Automate the reminder to prepare the welcome - never the welcome itself. The manager remains responsible for direct outreach, context, and connection before Day 1.

DAY 1 & WEEK 1

A Structured Employee and Manager Experience

The system coordinates delivery; the manager creates clarity, belonging, and role context.

Day 1 Sequence

SEQUENCE	EMPLOYEE EXPERIENCE	OWNER / EVIDENCE
Welcome & orientation	Personal manager welcome, team introductions, agenda review, support contacts	Manager confirms completion
Access verification	Employee tests required systems, equipment, communication, and file access	Employee test + issue ticket
Employment essentials	Complete remaining required forms, policies, and acknowledgments	Timestamped record and document version
Business context	Purpose, customers, operating model, communication norms, decision expectations	Orientation completed
Role clarity	Responsibilities, first priorities, success measures, meetings, and escalation path	Employee and manager acknowledgment
Learning launch	Begin sequenced training with examples, practice, and named resources	Training activity and assigned coach
End-of-day check	Confirm access, questions, workload, and Day 2 plan	Manager pulse check logged

Week 1 Control Points

- Day 2: unresolved access or equipment issues escalate automatically.
- Day 3: employee pulse asks about clarity, connection, tools, and immediate blockers.
- Day 3-5: manager observes an early role task and records coaching needs.
- Day 5: employee and manager complete a structured first-week check-in.
- End of Week 1: HR reviews overdue compliance items, unresolved exceptions, and risk flags.

Required First-Week Check-In

REVIEW AREA	PROMPT
Role clarity	Can the employee explain priorities, success measures, and where to escalate?
Tools & access	Can the employee complete core work without preventable barriers?
Training	Is learning relevant, sequenced, and supported by practice?
Connection	Does the employee know key partners, norms, and where to get help?
Manager support	Are check-ins occurring, feedback timely, and expectations specific?
Immediate risk	What could prevent successful ramp-up during the next three weeks?

30-60-90 DAY RAMP

From Task Completion to Demonstrated Readiness

Onboarding remains active until the employee can apply the standard with the expected level of support.

Role-Readiness Checkpoints

CHECKPOINT	EMPLOYEE OUTCOME	MANAGER RESPONSIBILITY	EVIDENCE / ACTION
Day 14	Understands core workflows and completes guided work	Observe execution; address access, clarity, and training gaps	Two-week pulse and open-gap log
Day 30	Performs foundational responsibilities with defined support	Review progress against role plan and reset priorities	30-day review; proficiency ratings
Day 45	Applies feedback and owns recurring work	Coach exceptions and confirm quality standards	Midpoint task or targeted follow-up
Day 60	Works with increasing independence and predictable quality	Evaluate performance evidence and remaining risk	60-day review; remediation if needed
Day 75	Demonstrates consistency across normal role scenarios	Confirm readiness for normal operating cadence	Readiness preview and gap alert
Day 90	Meets onboarding outcomes or has a documented decision path	Complete final assessment and communicate next steps	Workflow closure and performance handoff

Illustrative Proficiency Scale

LEVEL	OBSERVED STANDARD	WORKFLOW RESPONSE
1 - Introduced	Content or process presented; application not yet observed	Keep training open
2 - Guided	Completes work with step-by-step support	Assign practice and coaching
3 - Developing	Completes typical work with periodic correction	Target gaps and reassess
4 - Ready	Completes expected work independently at defined quality	Mark role outcome complete
5 - Resource	Handles exceptions and can guide others	Optional advanced designation

CONTROL BOUNDARY

The system may identify overdue work or risk indicators. It must never autonomously make discipline, continued-employment, or other consequential employment decisions.

AUTOMATION & ESCALATION

Rules That Keep the Workflow Moving

Every automation includes a trigger, condition, action, evidence, exception owner, and recovery path.

Core Automation Rules

TRIGGER / CONDITION	AUTOMATED ACTION	ESCALATION RULE	EVIDENCE
Offer accepted + required fields complete	Create employee record and role-based workflow	Hold and notify HR if validation fails	Workflow ID and timestamp
Required document submitted	Route for validation; advance only if accepted	Return with reason; alert HR if unresolved	Version, timestamp, reviewer
Policy assigned	Present current version and capture acknowledgment	Reminder; HR review if overdue	Identity, version, date
Access request completed	Notify employee / manager and create verification task	Reopen or ticket if access test fails	Provisioning ID and test
Checkpoint due	Send employee pulse and manager evaluation	Escalate missing manager review to HR	Responses and ratings
Risk indicator submitted	Create restricted review task for HR	Immediate routing for configured high-risk category	Restricted case ID and log
90-day requirements complete	Generate closeout summary and transfer open goals	Prevent closure while evidence is missing	Final status and handoff

Notification Standards

- State the required action, employee, due date, source link, and consequence of delay.
- Avoid duplicate reminders across email, chat, and task systems unless escalation requires it.
- Send sensitive information only to authorized recipients; never expose protected details in notification text.
- Stop reminders immediately when the validated completion event occurs.

CONTROLS & MEASUREMENT

A Workflow the Organization Can Maintain

The final system must be auditable, measurable, usable, and owned after implementation.

Fallback Controls

FAILURE MODE	RECOVERY CONTROL
Integration or sync failure	Create a visible exception, preserve the source record, and alert the workflow administrator.
Owner inactive or unavailable	Reassign through a role-based backup rather than leaving tasks attached to one person.
Notification delivery failure	Retry within limits, then create an alternate task for the human owner.
Incorrect template applied	Pause affected tasks, record the correction, and apply only the validated delta.
Conflicting completion records	Prevent automatic closure and route to the system-of-record owner for review.

Minimum Audit Evidence

- Employee identity and unique workflow ID.
- Task name, assigned owner, due date, completion date, and status history.
- Document name, version, acknowledgment or validation result, and timestamp.
- Approval, exception, reassignment, escalation, and override history.
- Training assignment, completion, observed proficiency, and manager sign-off.
- Workflow-template version and material changes applied during onboarding.

Illustrative Dashboard

MEASURE	WHAT IT REVEALS	ACTION THRESHOLD EXAMPLE
Pre-Day 1 readiness rate	Whether essential preparation is complete before start	Critical dependency unresolved
On-time task completion	Where ownership or capacity repeatedly breaks down	Trend below approved target
First-week exception volume	Common system, equipment, document, or manager failures	Repeat issue by role or location
Employee clarity / connection	Early experience and preventable attrition risk	Low response or high-risk comment
30/60/90 checkpoint completion	Whether managers actively manage ramp-up	Missing or overdue review
Time to role readiness	Whether training and role design support productivity	Variance by role or cohort

IMPLEMENTATION & GOVERNANCE

From Workflow Design to Operational Ownership

A controlled implementation validates the current state, tests exception paths, confirms ownership, and establishes an ongoing review cadence.

Implementation Sequence

PHASE	PRIMARY WORK	EXIT CRITERIA
1. Discover	Confirm current process, roles, systems, policies, employee groups, risk points, and desired experience	Validated requirements and owner map
2. Design	Map future state; define templates, data, rules, permissions, controls, and messages	Approved workflow specification
3. Configure & test	Build workflow; test normal, changed-date, missing-data, failed-access, overdue, and cancellation scenarios	Defects resolved and owners trained
4. Pilot	Launch with a controlled cohort; collect employee and manager feedback	Pilot outcomes accepted
5. Govern	Publish ownership, change control, metrics cadence, review dates, and support process	Operational handoff complete

When Progress Is Off Track

- Create a specific action with an owner, support resource, observable standard, and review date.
- Route high-risk employee matters to appropriate human review; automation does not make employment decisions.
- Document the facts, coaching, resources, employee response, and next decision point.

DEFINITION OF SUCCESS

The workflow is successful when it creates a consistent employee experience, exposes risk early, reduces manual follow-up, and helps managers produce demonstrably ready employees.