

## Digital Onboarding

### Guide for Local Authorities Recruiters

<b>Contents</b>	<b>Page</b>
1. Introduction	<a href="#"><u>2</u></a>
2. Making an offer at this time	<a href="#"><u>2</u></a>
3. Engagement	<a href="#"><u>2</u></a>
4. The Essentials	<a href="#"><u>3</u></a>
5. References	<a href="#"><u>4</u></a>
6. DBS Check	<a href="#"><u>4</u></a>
7. “Keeping Warm” text messages	<a href="#"><u>4</u></a>
8. Notifications to other teams	<a href="#"><u>5</u></a>
9. Contract generation and acceptance	<a href="#"><u>5</u></a>
10. Welcome messages/Videos	<a href="#"><u>5</u></a>
11. Pre start reading	<a href="#"><u>5</u></a>
12. Recommendations	<a href="#"><u>6</u></a>
13. How can WME and Saba support you?	<a href="#"><u>6</u></a>



## 1. Introduction

In the current environment many will face a new challenge to onboard new (and often urgently required) colleagues whilst remote working, circumstances we are not used to. This may feel daunting, but we have been providing digitally enabled on-boarding support and hence wanted to share with your recruitment teams some advice and guidance in the continuation of onboarding new employees virtually.

The type of onboarding you do will also be affected by the following factors:

- Business Critical Posts – where speed is the priority
- Volunteers – where safeguarding and speed of turnaround is key
- Jobs where a start date is deferred – where roles are not an urgent requirement so can be deferred but engagement with the new starter is a priority, so longer-term service needs are maintained and future strain on the service avoided.

This guide will showcase how you can apply speed, safeguarding and engagement all through technology whilst we predominantly work remotely.

This document will refer to the use of the Talentlink Applicant Tracking System (ATS) provided to us by Saba, but is intended as best practice which can also be applied to other ATS software.

The following information is shared on this basis.

## 2. Making an offer at this time

If you're considering making an offer or having doubts about an offer you've already made, this is a sensible response to the current climate. Take a long-term view, remember why you needed to hire in the first place, nothing has changed long-term and you still need the expertise and experience that this candidate can offer.

How you act in the next few weeks and possibly months will say a lot to the prospective new starter about how you care for their wellbeing and how you look after your staff in general. Be supportive, pragmatic and continue in a manner as close to 'business as usual' as possible, and you'll be more likely to earn their loyalty in the future.

## 3. Engagement

Once you have made an offer, it's of prime importance that you make every effort to support your new team member during their notice period. In the current climate, they need to feel a sense of security and support from you, or they may drop out of the process or take up a counter-offer.

Consider their emotions, your new candidate is leaving the safety of their current role to come and work for you. This is a big decision even before you factor in that their early days with your organisation might comprise entirely of remote working. This may prove intimidating, so it's important to stay in regular communication and impress upon them a sense of security, community and belonging.

During this time, line managers should try to get them involved with their team, particularly if they have any direct reports. This can be a challenge when everyone's working remotely, but there are things you can do to give them a sense of the community they'll be joining.



- Enter them into a group chat, on WhatsApp, Skype or similar, with their immediate team.
- Introduce them and encourage discussion
- Schedule one-to-one video calls with key team members
- Schedule 'coffee time' – informal video meet-ups for immediate team members to get to know their new colleague
- Send email updates, 'what's happening in the department', so that they can hit the ground running

#### 4. The Essentials

Generally following the verbal offer you will need to collect all the various clearances required. Some authorities have historically done this via a face to face meeting with the candidate in order to verify documentation in line with legislation and guidance. Your Applicant Tracking system may be able to help you with some of this and you may already have steps set up. Below are some suggestions to adjust these into a remote working environment:

Within your ATS, configure the system to ask your candidate to provide some or all of the following:

- Offer Acceptance
- Collection of Bank Details
- Emergency Contact Info
- Medical Information
- Collection of scanned ID docs, qualifications etc
- Upload of other required documents (i.e. picture for ID badge, professional registration etc)
- National Insurance & Tax Details

When using Talentlink you are able to create a response form so that the candidate can provide all this information in one go online, including being able to upload documents which then become safely stored in the system. The upload capability isn't used widely in the region to date, but given the current remote working environment, can be easily incorporated into a document sent to new recruits. Talentlink will allow you to put instructions around any document upload to assist your candidate to do this.

This is usually done as part of a conditional offer sent by email but can be done at any stage in the process. For those roles that are business critical or for urgent volunteers you should consider asking for this information at an earlier stage in the process. This has recently been undertaken for the NHS where they now ask for any current DBS information as part of the initial expression of interest as a means to speed up the process. This example is snipped below



**NHS VOLUNTEER  
RESPONDERS**

Your NHS needs you! Join our team today.



Do you hold a Recent DBS certificate (Issued in the past 12 months) \*  You can prove your ID with a DBS certificate, Passport, Driving License, Bank statement or Utility bills.

Date of issue (YYYY-MM-DD) \*

Current DBS Status \*

DBS certificate (jpeg or png) \*    (NO PDFs, Images only)

Another option to collect documents is at the time of interview and this already takes place in some organisations. Your ATS may allow recruiting managers to upload documents to the system and this is possible in Talentlink. Talentlink also provides a free to use mobile phone app which can take a photo of the required documents and upload them directly to the candidate record.

## 5. References

Electronic referencing is widely used in the region. If you are not already doing this, this is possible in most ATS and consists of an email with a reference attached. In Talentlink you can design the content of the reference itself and use different versions or use branching questions to tailor what information is collected from a referee. The Talentlink system will also allow you to automatically send reminders whilst this reference is outstanding.

As a further step you should also consider using your ATS to trigger the approval of references once these have been collected. This allows managers to review references and “sign them off” online.

## 6. DBS Check

On 19<sup>th</sup> March 2020, DBS relaxed their requirement to see original copies of supporting ID documents prior to submitting the application. This is a temporary measure which will enable:

- a) ID documents to be viewed over video link and
- b) scanned images to be used in advance of the DBS check being submitted.

Your ATS may allow you to obtain these documents from the candidate remotely. Within Talentlink this can be done using “Video Review” questions allowing a candidate the ability to record themselves with their documents, and “document upload” questions to send these to you.

With these temporary arrangements now in place you should also consider if the DBS application can be initiated earlier in the process.

Depending on the level of DBS required in the new role and the candidate’s registration with the DBS update service, this may also be a means to speed up DBS checks.

## 7. “Keeping Warm” Text Messages

Text messages and message apps such as WhatsApp are increasingly part of our everyday lives. . So in this scenario using text messaging throughout the onboarding process is an efficient way to keep in touch with your candidate in real time, letting them know what is going on and supporting them to feel connected to your organisation. It may also prompt them to let you know about any



changes at their end. Some ATS systems including Talentlink can support sending text messages and provide a record of when this was done.

## 8. Notification to other Teams

As part of onboarding, you may need to notify other departments such as Facilities or ICT that your new starter requires setting up with them and maybe an ID card or similar. You may have other systems to manage this, however if not, then your ATS may help. If using Talentlink you can communicate to other departments, send them your new candidate detail as well as perhaps an ID photo you have collected from the candidate.

## 9. Contract Generation and Acceptance

You may already use Talentlink/ your ATS to generate contracts based on information already provided by the candidate, the recruiting manager and your HR team. If your contracts are generated manually or using a HRIS your ATS may still be able to submit these via email to your new starter. Particularly in these times of remote working, you may also wish to use your ATS to incorporate an online acceptance or e-signature to this contract. Separately there are also products available from Adobe, Docusign and others which can support online signatures to important documents.

## 10. Welcome Messages/Videos

As part of your formal communication on the conditional offer or contract, or perhaps separately, consider sending a short welcome video from the hiring manager to your new starter. Some ATS including Talentlink can facilitate this or you may look at other messaging platforms to do this. In Talentlink this is using “Video Brand” functionality allowing you to send short video recordings to candidates via email. The recorded content does not need to be formal and will go some way to bridging the gap of remote working.

### TIP

If your new employee is working from home, they may be inundated with emails. Cut through the noise with a short video introduction.

### What should you do?

- Welcome them to the company
- Be excited for them to join your team
- Explain a little more about the next steps and early onboarding process
- Let them know that remote working is no barrier and that you’ll do everything you can to make things work.
- Share the video with them privately, by email or perhaps embed more general messages onto an onboarding site.

## 11. Pre Start Reading

Before a new starter begins it’s likely you will need them to read various policies, organisational information or e-learning. You may have processes in place to handle this online. If not, consider incorporating links to various sites or documents within the communications sent from your ATS. Alternatively, you might wish to use a microsite to consolidate these. An example is <https://welcometowme.org.uk/>. Your local ICT team may be able to support this, if not WME may be able to help.



## 12. Recommendations

- For those roles that are business critical or for urgent volunteers you should consider asking for the essential clearance information at an earlier stage in the process.
- Where possible, consolidate the request for clearance information into a single email and form for the candidate to complete.
- If feasible use or implement E-signature documents.
- Use real time messaging /SMS text messaging through an ATS like Talentlink, or platforms such as WhatsApp as there may be changes in your candidate’s circumstances and their ability to start work, which will help with engagement.
- Incorporate video messages into your onboarding and communicate often via phone, email or messaging.
- If not already available get an on-boarding site up and running.

## 13. How can WME and Saba support you?

What	Cost	Notes
“Onboarding Remotely” Webinar (and recording)	Free of charge	To showcase a virtual onboarding process using Talentlink.
Use of Video Review questions or document upload questions in Talentlink to evidence DBS supporting documents	Free of charge	More Information <a href="#">here</a>
Video Welcome Messages via Talentlink	Free of charge (for 90 days)	Using Video Brand functionality, you can create your content locally. WME will provide guidance on how to do this.
Talentlink Integration with DocuSign	£1500* (plus docuSign envelope cost)	*5 subscribers minimum take up required to deliver service.
SMS Text messaging via Talentlink -	(£445 activation for new users only)  £350 WME annual administration  Plus Text Bundle Annual fees (from £24 - £500)	Service is offered as an annual bundle.
Creation of bespoke Onboarding microsites	From £1000	Exact cost to be agreed dependant upon specification Example: <a href="https://welcometowme.org.uk/">https://welcometowme.org.uk/</a>



Configuration of your Talentlink system to incorporate virtual onboarding steps	Free of charge (if taken from your configuration support time allocated for 2020) or £425	Typical turnaround 5 days from specification confirmation.
---	---	--

We hope that the above information offers some pointers towards moving some processes online. Should you wish to discuss further do not hesitate to get in touch with the team or directly as below.

**Dean Lathbury**  
**Senior Consultant – Resourcing**

**T: 0121 569 2070 M: 07824 137395 E:d.lathbury@wmemployers.org.uk**

