

New Employee Onboarding Automation

The Challenge

Onboarding multiple security staff at once was overwhelming and chaotic for the client. They faced:

- Disorganized onboarding for large groups, leading to confusion and delays
- Overloading new hires with critical information, risking retention and effectiveness
- Inconsistent and untimely delivery of essential training materials, jeopardizing security standards

The Solution

We developed a solution within HubSpot to automate the onboarding email process, ensuring that new employees receive essential information gradually over their first month. This process is set to trigger automatically upon hiring, and covers important topics like company culture, role expectations, and key contact information — all spaced out to avoid information overload.

The Impact

- Client now has a smoother, more manageable, and more consistent onboarding process, reducing both training oversights and manual effort
- New hires now receive critical information at the right time without overwhelming them
- Staff have easier access to essential links and contacts

The Details

Industry:
Security

Business Area:
Human Resources

Tools Used:

- Custom Properties
- Automated Email
- Workflow

