



Insurance Brokers &
Consultants

PULSE SURVEY ONBOARDING & OFFBOARDING

We are committed to understanding and anticipating our network's needs - especially during times of uncertainty.

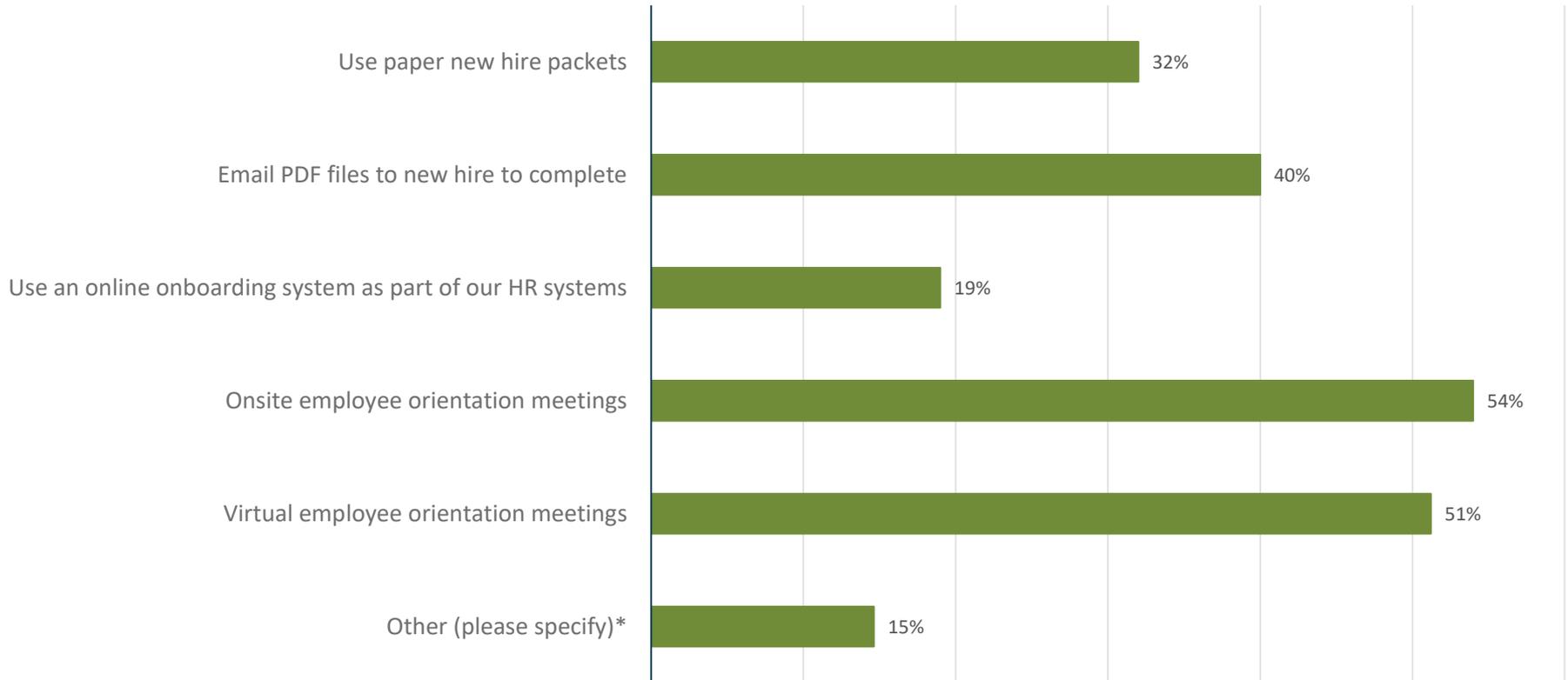
To help gauge observations, experiences and expectations surrounding the Coronavirus pandemic, we executed a Pulse Survey series.

This presentation presents results from the Onboarding & Offboarding pulse survey.

SURVEY RESPONSES

How do you currently support new hire onboarding?

Question Type: Multi-Select ● Answered: 41 ● Skipped: 0

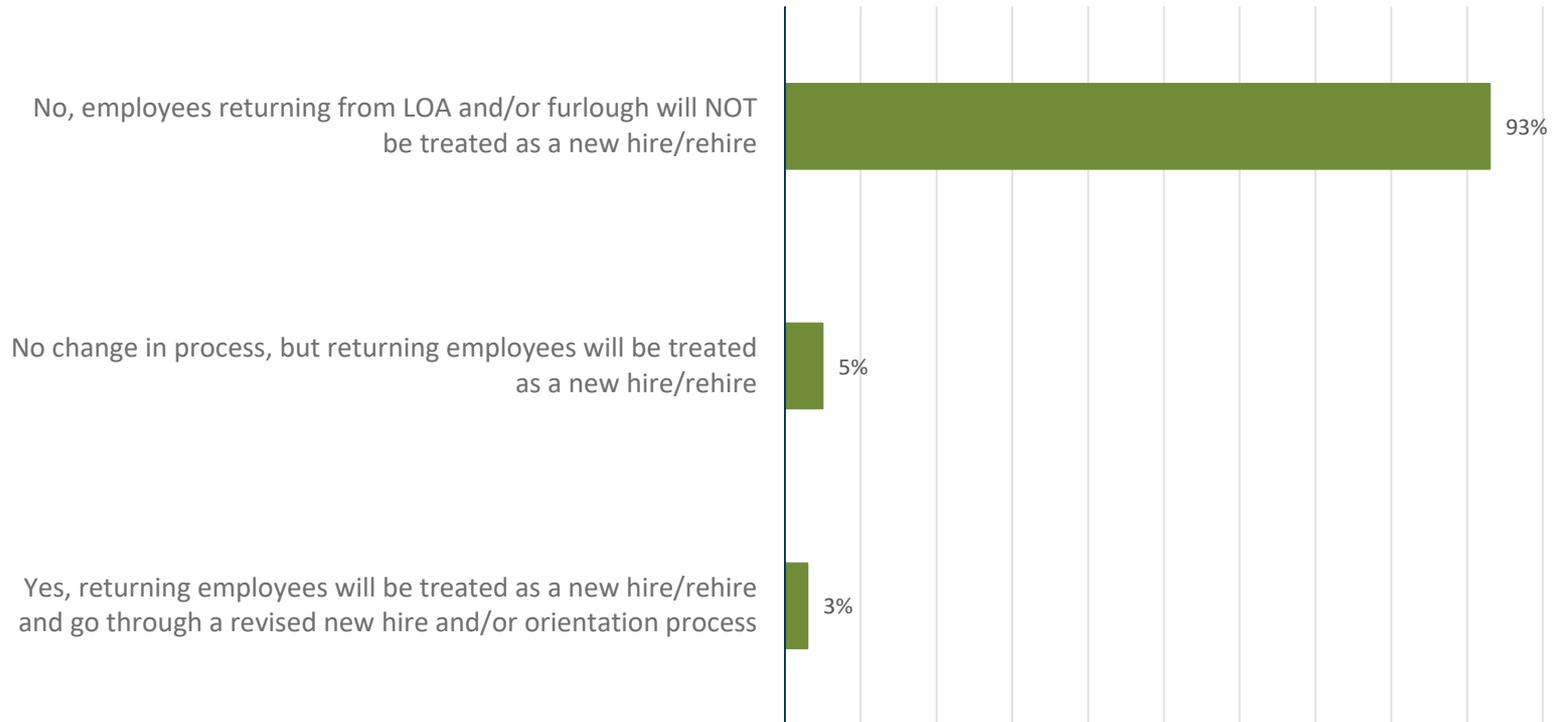


**See Appendix A for full list of responses categorized as 'Other (please specify).'*

SURVEY RESPONSES

Has your organization considered making any adjustments to your current onboarding process to support employees returning from LOA and/or furloughs due to the pandemic?

Question Type: Single Select ● Answered: 41 ● Skipped: 0

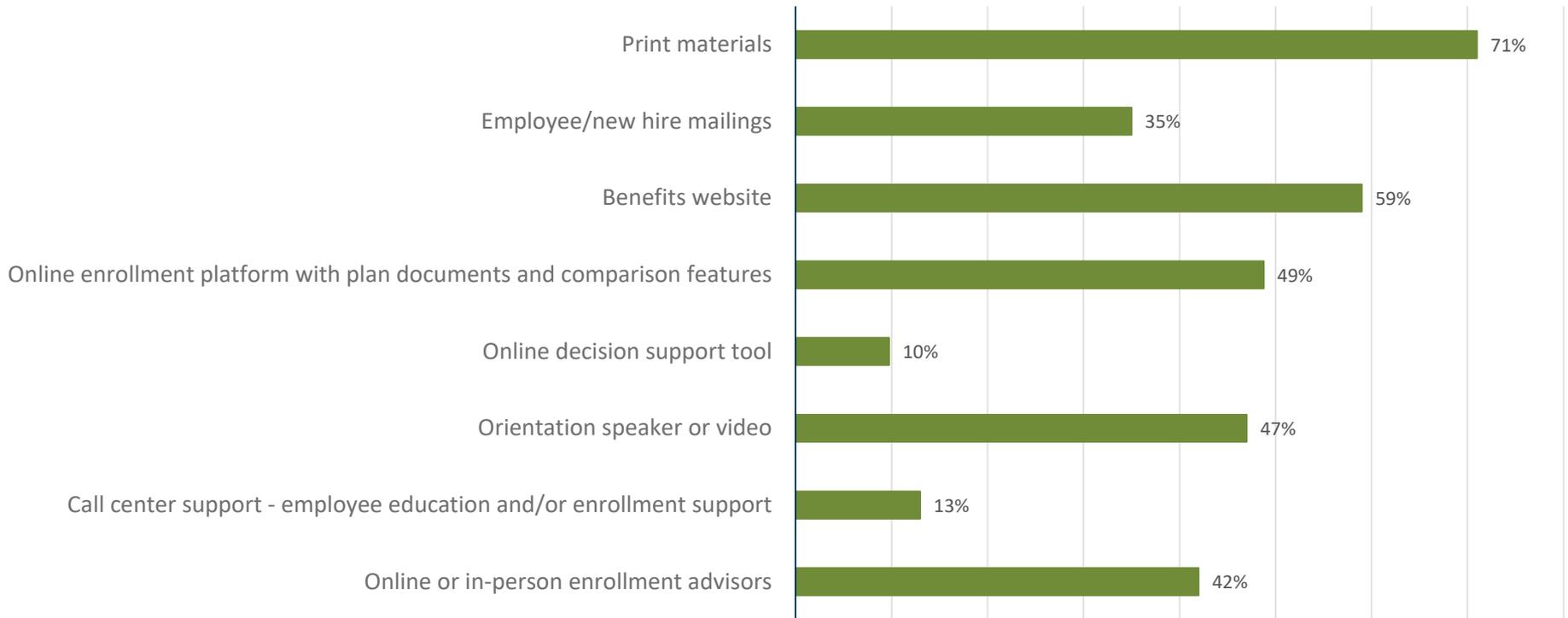


All response percentages have been rounded up to the nearest whole number.

SURVEY RESPONSES

What tools and resources does your organization use to support your onboarding process and communicate the employee benefits?

Question Type: Multi-Select ● Answered: 41 ● Skipped: 0

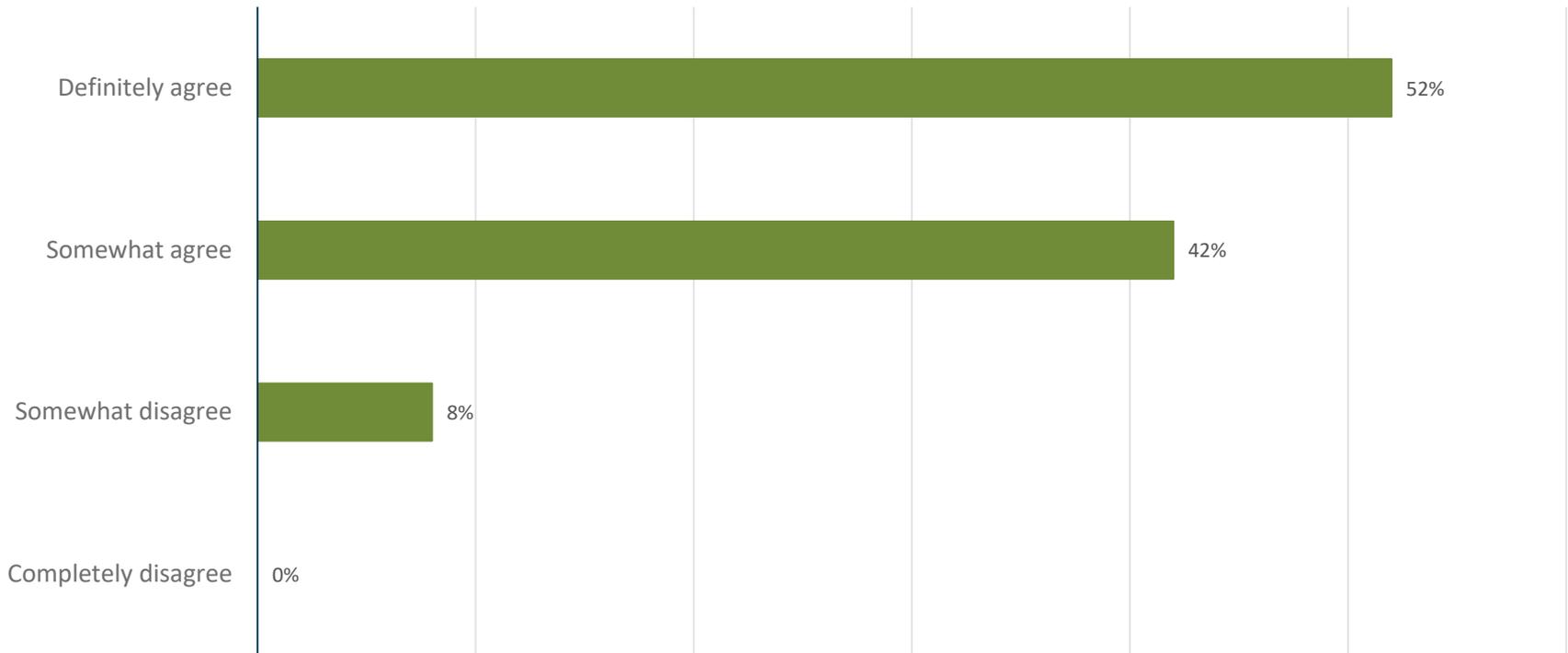


All response percentages have been rounded up to the nearest whole number.

SURVEY RESPONSES

Do you agree that the value of your company's benefits are effectively communicated as part of your current onboarding process?

Question Type: Single Select ● Answered: 41 ● Skipped: 0

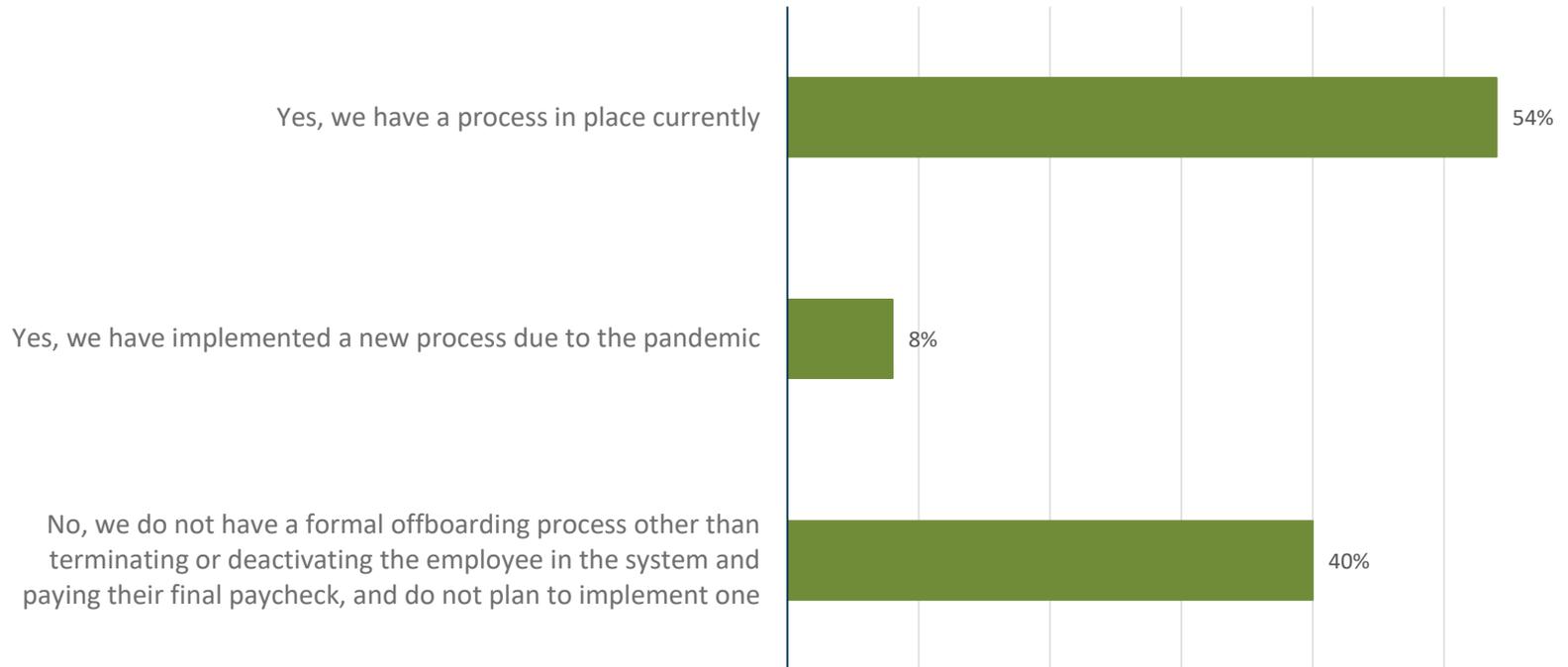


All response percentages have been rounded up to the nearest whole number.

SURVEY RESPONSES

Due to the pandemic and potential staff reductions, has your organization utilized an “offboarding” process for employees who are laid off or furloughed? (e.g., a specific workflow or series of tasks to remove the employee’s access from various company systems, collect company property, etc.)

Question Type: Single Select ● Answered: 41 ● Skipped: 0



All response percentages have been rounded up to the nearest whole number.

SURVEY RESPONSES

Due to the pandemic, what communication protocols (if any) have you implemented for employees who have been temporarily or permanently laid off or furloughed?

Question Type: Free Text • Answered: 32 • Skipped: 9

Most respondents have not laid off employees

All affected respondents have communicated with this audience via:

- Email
- Phone (call/text)
- Human Resources
- Onsite discussions

Maintaining communications with those affected and helping to reassign them as job openings arise.

SURVEY RESPONSES

Do you have any specific challenges or frustrations around your organization's current onboarding process? If so, please provide details. (EPIC has supported a number of clients with streamlining and automating their onboarding processes and can assist in providing best practices.)

Question Type: Free Text • Answered: 29 • Skipped: 12

Of respondents, 15 reported no challenges or frustrations

Smaller firms noted the cost associated with employee payroll platforms

Many respondents reported too many required steps, or frustration with their current HRIS platform

Some concern with paperwork and manual filing

SURVEY RESPONSES

What unique and innovative onboarding processes have you implemented that have been successful and others may find valuable?

Question Type: Free Text ● Answered: 21 ● Skipped: 20

5 reported no unique processes at this time

7 respondents have implemented a form of virtual meeting

3 respondents have utilized HRIS or similar platforms

Ongoing communication for new hires

See Appendix B for full list of responses.

SURVEY RESPONSES

What is your industry?

Question Type: Single Select • Answered: 41 • Skipped: 0

23
Industries

Highest Responses:

Healthcare/Medical (9.76%)
Non-Profit (9.76%)
Legal (7.32%)
Manufacturing (7.32%)
Real Estate (7.32%)

Accounting
Advertising
Agriculture/Forestry/Fishing
Biotechnology
Construction/Home Improvement
Education
Energy
Engineering/Architecture
Finance/Banking
Government/Military
Healthcare/Medical
Insurance

Internet
Legal
Manufacturing
Non-Profit
Oil & Gas
Real Estate
Rental
Retail
Telecommunications
Transportation/Distribution
Wholesale

SURVEY RESPONSES

Participating Companies

Question Type: Free Text • Answered: 41 • Skipped: 0



40
Companies
Represented

RESULTS SUMMARY

Important Considerations & Findings

Onboarding Process

- **38** respondents will not train returning employees as new hires
- Most challenges and frustrations revolved around efficiency of the HRIS platform or the steps associated with the process

Benefits Communication

- **43** selections include a form of print (print materials and/or employee new hire mailings)
- **42** respondent selections reflect the use of online or electronic meetings, benefit guides, and/or an online onboarding system

Offboarding Process

- Approximately **60%** of respondents have some form of offboarding process
- **3** respondents developed offboarding processes specific to the pandemic



APPENDIX

APPENDIX A

How do you currently support new hire onboarding?

Responses to the Other (please specify) option:

- Interviewing via Zoom
- DocuSign
- Employee Orientation Videos/Courses through LMS
- We use a combo of online, virtual and in person meetings
- DocuSign
- Just beginning to think of these matters, undecided

APPENDIX B

What unique and innovative onboarding processes have you implemented that have been successful and others may find valuable?

Free Text Responses

- At this point, we are traditional in that employees will receive an online packet to complete, but also have in person meetings with us. For MD's, we offer office tours and orientation to the practice.
- Virtual orientation
- We have instituted all applicants going through our HCM including candidates that come from agencies. Has been a big time save.
- Added a video for the employee to watch around benefits
- Using Zoom
- Onboarding does not stop on the day the employees shows up for work. We use follow communications - day 1, week 2 and 30, 60, 90 day check ins. We also provide employees with a career advisor and a PAL.
- Rather than just one speaker, utilizing points of contact from each support team, i.e. IT, Safety, Public Affairs, etc. so that new hires get to meet new people on their first day, varying up the presenter for interest, etc.
- We recently implemented updated automated emails that are sent out from our HRIS over the first two weeks after a new hire starts. The emails have different topics that reminds the person to sign policies, timekeeping processes, ordering business card steps, participating in the wellness program, etc. It helps to spread out the information that typically occurs during an orientation, so the new hire can take it all in in smaller pieces.
- Virtual meetings for on boarding meetings. More phone calls to discuss benefits.
- DocuSign
- We have been using an on-line platform to electronically deliver material, we have orientation via video, and we send new hires their equipment to their home before they start.
- passive enrollment
- Using our HRIS for onboarding has created a seamless process for candidates and managers.
- We have an online HRIS/Benefits system in addition we host live webinars for all new hires weekly.
- Using cloud based virtual systems during shelter in place so we are not shipping hard equipment
- Use Teams to interact remotely with new hire who started shortly after stay at home was put in place.