Employee and Customer Onboarding
Build a consistent and friendly experience

Onboarding is a Journey

First impressions matter a lot, and new employees and customers notice if their arrival is smooth and well planned, or a chaotic series of fire drills.

There are also operational and security reasons to get it right. Are the new employee accounts set up correctly? Do the right people have access to the new customer's information? Has the employee or customer signed the necessary paperwork?

This is even more important during offboarding - forgetting to remove access to company resources could be a big liability, yet with the customer or employee gone, there's no squeaky wheel to remember to turn things off.

Having resources for new employees and customers is only the beginning. Workflows, checklists, and reminders are key to success and to ensure compliance. Some steps may be automated, others may require approvals or decisions from key stakeholders. The challenges are so pervasive that a cottage industry of onboarding and offboarding applications and HR systems add-ins has emerged, yet these almost always need to be configured and enhanced to meet the needs of an organization.

The thing is, your organization uses Microsoft 365, you may already have all the tools you need. So why buy another tool when Spyglass MTG can tailor the technology you're already paying for to meet your organization's needs?

A multifaceted challenge

An effective and repeatable onboarding process is a combination of planning, tools, compliance, and of course personal engagement and providing the resources your employees and customers need. Setting it up requires a combination of people skills, business skills, and technical know-how.
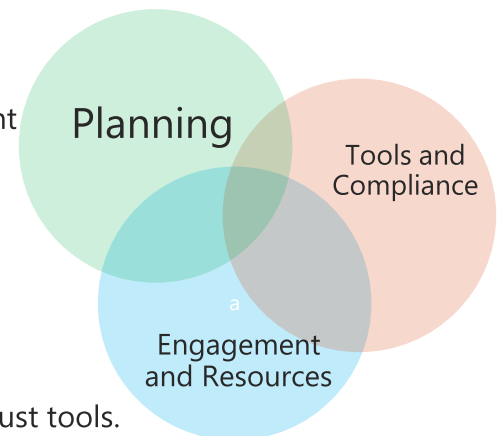
Most organizations don't have the full complement of skills and experience in-house to pull it all together – and the stakeholders are typically already busy doing their regular jobs. Onboarding applications can help, but they need to be tailored and configured, and – most importantly – the challenge goes beyond just tools.

A qualified partner with the necessary skills and experience can make all the difference is building a successful solution that's tailored to your organization.

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Spyglass MTG is your trusted advisor

We have been in business for over seven years and have the combination of people, business, and technical skills to build effective onboarding and offboarding solutions for our clients. Our company has a long-standing partner relationship with Microsoft where we have focused on their on-premises and cloud products for over seven years. We not only understand the technology, we have the experience to know how to apply it in companies like yours.

Our proven methodology for success

Let our team of experienced business analysts and workplace architects guide you through the process of designing an onboarding and offboarding solution that meets the unique needs of your company. We will interview key personnel involved with the onboarding, and assess the security and business systems involved. In most cases, we have direct experience with these systems.

Tools of the Trade

✔ **SharePoint** for training and orientation

✔ **Microsoft Teams** for collaboration and mentoring

✔ **Power Automate** to orchestrate onboarding processes

✔ **Scripts and Runbooks** to automate system setup tasks

We then bring all of this together to work with you to design and implement an onboarding and offboarding solution tailored to your enterprise, modifying it as needed through ongoing collaboration and discussion. In the end, we will have a deliver a complete, end-to-end approach for successful onboarding and offboarding.

Complimentary assessment

Spyglass MTG is offering a complimentary assessment for your organization to explain many of the complexities a project like this involves. Based on our initial conversation, we will highlight the simple and complex portions of the project, tell you about some of the mistakes we have seen on this journey, highlight the steps in our methodical approach, and how we may be able to help in your success.

We are experts with a white-board and will use it to help further explain the technical and organizational challenges you may expect to encounter. So please have a white-board available, plenty of dry-erase markers, and allow us to take you on a journey as we explore your needs and how the tools you already own can be brought to bear in a successful and repeatable onboarding and offboarding solution.

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