

PLAYBOOK • OCTOBER 2026

The employee onboarding playbook: five handoffs to fix before day one

Where onboarding breaks between HR, IT, security, facilities and finance, the eight systems a new hire touches, and a phased plan to run it as one workflow.

Onboarding is a dozen small jobs in five departments

A new hire looks like one request. In practice it is a dozen small jobs spread across six groups, each done in a different system by someone waiting on someone else.

Most organizations hold it together with a checklist, a shared inbox and a few people who know whom to chase. When those people are busy, the checklist stops moving. Teams then fill the gaps on their own: a spreadsheet tracker in HR, a separate access request form in IT, a hiring manager who emails facilities directly. Each workaround helps one team and leaves the next one guessing.

This playbook shows where onboarding breaks and which systems it touches. It ends with a checklist and a plan for moving onboarding onto one workflow while every system stays in place.

The five handoffs where onboarding breaks

Most of the delay sits in the gaps between teams, not inside any one of them.

Figure 1. The five handoffs, what goes wrong, and what the new hire notices

Handoff	What goes wrong	What the new hire notices
1. HR to IT	HR enters the hire in the HR system, but IT isn't told. Directory, email and application accounts wait.	No login on the first morning.
2. IT to facilities and security	Accounts exist, but the badge and equipment requests sit in an email thread.	A locked door and no laptop.
3. Security to the manager	Access needs the manager's approval, and the request is buried in their inbox. Security can't proceed.	Days without the systems the job needs.
4. Finance	Budget, payroll and cost center updates are handled separately from everything else.	Payroll or benefits questions in week one.
5. Everyone	Nobody can see the whole request, and there is no single record of what access was granted, by whom and when.	Calls to the service desk to ask where things are.

The pattern is the same at every step. Each handoff loses some context and adds some delay, and the access record gets a little less complete. One slow handoff is an annoyance. Five in a row is a new employee who spends the first week waiting.

The last handoff matters most to security and audit teams. When access is granted through emails and tickets in different systems, nobody can answer “who gave this person access to that, and when?” without a search across all of them. The same gap shows up again at

offboarding, when access that was never recorded in one place has to be removed from every system.

What a delayed start costs you

The cost of a slow start is easy to underestimate because nobody receives an invoice for it. You can estimate it from three of your own numbers.

Figure 2. A cost-of-delay worksheet. Fill it in with your own figures.

A. New hires per year

From HR. Include contractors who need system access.

B. Days a new hire waits for full access

Ask the last ten hires, or compare start dates with access dates in your service desk.

C. Cost of one lost working day

Loaded daily cost of an average new hire, from finance.

A × B × C is the yearly cost of waiting, before counting the time HR, IT and managers spend chasing status.

Add the hidden costs that don't appear in that number:

- **Coordination time.** HR and IT staff chasing status, re-keying details and answering “is it done yet?”
- **Security exposure.** Access granted by hand is granted inconsistently, and inconsistent access is what fails an audit.
- **First impressions.** A new hire who waits a week for a laptop forms an opinion of the organization in that week.

- **Manager time.** Every follow-up email is time not spent bringing the new person up to speed.

How onboarding runs as one workflow

You can fix this with the systems you already have. Onboarding becomes one process that runs across them, in three layers.

Figure 3. A new hire request, from the form to every system it updates

Experience layer

HR or the hiring manager submits one new-hire request on the organization's own portal. The form asks only what applies to the role and location.

Workflow layer

The workflow starts every task in parallel where it can and in order where it must, sends approvals to the right people with the request summarized, and escalates anything overdue.

Integration layer

Kinetic writes to each system of record: the HR record, the directory account, the mailbox, the badge, the equipment ticket and the payroll setup. Each system stays the source of truth for its part.

Everyone involved sees the same status, from the first form to the last system update.

The eight systems a new hire touches

The details vary by organization, but most onboarding touches the same eight places. Writing them down is the first step in mapping your own process.

Figure 4. The eight systems, common examples, and what onboarding does in each

System	Common examples	What onboarding does there
HR system	Workday, BambooHR, ADP	Source of the hire: name, role, start date, department
Identity provider	Active Directory, Entra ID	Account, group membership and role-based access
Email	Exchange, Microsoft 365, Google Workspace	Mailbox, distribution lists and shared calendars
IT service management	ServiceNow, Jira Service Management	Equipment, software licenses and hardware assignment
Badge and physical access	Your access control system	Building, parking and secure-area access
Finance and payroll	Workday, ADP	Cost center, payroll setup and benefits enrollment
Security and compliance	Background check and training tools	Check status, required training and policy acceptance
People	The hiring manager and approvers	Approvals at the points that need judgment, and visible status

Kinetic connects to systems like these through pre-built handlers and their REST APIs. If a system has an OpenAPI spec, Kinetic can connect to it. The point of the table is that none of these systems needs to change. Onboarding gets fixed in the space between them.

Report a problem or request a service

Refuse & Recycling



Missed Garbage Pickup

Your tote was out but not collected



Missed Recycling Pickup

Blue bin skipped on collection day



Bulk Trash Pickup

Schedule pickup for furniture and large items



Leaf Collection

Leaf piles missed on your scheduled week

Streets & Sidewalks



Pothole

Report a pothole on a City street



Streetlight Out

A streetlight is out or flickering

Snow & Ice



Snow Plowing - Residential Street

Your street has not been plowed



Sidewalk Snow Not Cleared

Unsafe, uncleared sidewalk

Water



Water Main Break / Leak

Water coming up through the street



Low Water Pressure

Low pressure at your tap

Forestry



Street Tree Maintenance

Dead limbs or damaged City trees

One front door for requests that land in several departments' systems. Shown for a fictional organization with sample data.

A readiness checklist

Use this before you start. A gap in the list is fine. It tells you what to settle in the first working session.

Experience

- ☐ A portal or site you own and control
- ☐ Forms that write to more than one system
- ☐ One place to see request status

Workflow

- ☐ Workflows that HR and IT staff can change without a developer
- ☐ Approvals routed by role, location and access type
- ☐ Escalation when a task runs late

Systems

- ☐ HR system and identity provider
- ☐ Email and IT service management
- ☐ Badge access, finance and payroll
- ☐ Security and compliance tools

A phased plan, from one department to the whole lifecycle

Start with one painful handoff and prove it, then widen the scope. The phases below are a typical shape. Your timing depends on how many systems are in the first workflow and how quickly approvers can agree on the rules.

Figure 5. Phases of an onboarding rollout

Phase	What happens	What you measure
1. Pilot	Map today's process. Pick the most painful handoff, usually HR to IT. Build the workflow for one department.	Today's baseline: days to full access, hours spent chasing
2. Prove it	Run the pilot alongside the manual process. Ask the people using it what to change, then refine.	Time saved, errors avoided, what people say
3. Widen the scope	Add facilities, security and finance. Train HR and IT on owning the workflow.	Share of steps that run without a person
4. Scale	Every new hire goes through it. Add exception paths and role-specific steps.	Adoption, exceptions, time to full access
5. The whole lifecycle	Reuse the same connections for role changes, offboarding and access requests.	Access removed on time at departure

Four things decide whether the rollout works:

1. **Start small.** One workflow and one department, proven, before anything else.
2. **Integrate, don't replace.** The HR system, directory and service desk stay where they are.
3. **Price for use, not seats.** If every manager and approver costs a license, organizations limit who can take part, and the handoffs come back.

4. **Design for the people who use it.** If HR and managers won't use the form, the automation behind it doesn't matter.

What GreenState Credit Union built

GreenState grew from about 200 to nearly 900 employees, and every hire, promotion and departure ran on checklists and email between HR, IT and security. It built one Kinetic workflow that HR starts and that updates Active Directory and Exchange directly. Manual intervention in employee transitions fell 85%, and new hires can sign in on day one.

“When we first started looking at Kinetic, we were searching for a front-end solution for our IT self-service portal... but as we learned more, we realized it could be so much more — it wasn't just about IT requests; it could become the backbone of how we automate and manage employee services across the entire organization.”

Chris Troyer, IT Business Partner, GreenState Credit Union

The [GreenState case study](#) covers onboarding, role changes and offboarding in more detail.

What AI does and does not do here

AI helps build the workflow and handles specific steps inside it. Through MCP, an AI assistant can draft the onboarding form and workflow in Kinetic for your team to review, and it can create records and start workflows within the signed-in user's permissions. Inside the workflow, an AI step can check a request for missing details or summarize it for an approver.

AI does not decide who gets access. Approvals belong to people, and the routing, provisioning and record-keeping run as defined steps, the same way for every hire. You choose the model, including one you host yourself.

What you can build next

The connections you build for onboarding are the same ones the rest of the employee lifecycle needs.

- **Employee offboarding** removes access from the same systems on the departure date, with a record of each step.
- **Employee onboarding** walks through the workflow itself, step by step.

Frequently asked questions

Do we have to replace our HR system or service desk? No. Kinetic reads from and writes to the systems you already run. The HR system stays the source of the hire, and the service desk keeps handling the work it handles today.

Where should we start? With the handoff that causes the most waiting, which is usually HR to IT. Prove it for one department, then add facilities, security and finance.

Can HR change the workflow without IT? Yes, within the permissions you set. Process owners can change forms and approval routing in Kinetic, while changes to connections stay with IT.

Does this cover role changes and offboarding? Yes. They use the same connections and approval rules as onboarding, so they are usually the next workflows to build.

Start with one handoff

In a free two-hour **working session**, we map your onboarding process with your team, from the HR record to the last system update, and send you a written plan for building it.

NEXT STEP

Bring us one process that crosses your systems

In a free two-hour working session we map one of your processes, from the first request to the last system update, and send you a written plan for building it.

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Kinetic Data is the build platform for AI-enabled business. Its Kinetic platform lets organizations build applications, workflows and agent-ready processes on top of the systems they already own, with AI generating the experiences and workflows and people and agents working in the same process.

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