

A Non-profit organization improved volunteers' onboarding experience with a personalized SharePoint solution.

## Client Business Description

The client is one of the largest voluntary health organizations in the United States. With a mission to build a healthier world, free of cardiovascular diseases and strokes, the association also funds innovative research, advocates for stronger public health policies, and provides critical tools and information that save and improve lives.

## Situation

With over 10,000 volunteers joining our client each year, onboarding each volunteer involved tasks that went through a sequence of operations. It also involved numerous approval cycles and reiterations before they finally got approved.

As they continued to grow, the process of volunteer onboarding over papers and emails became voluminous.

Simple tasks, like tracking the status of a process, where it had stalled, what was stalling, and the duration to complete a task, were a lot more complicated than one could expect.

The staff at the NPO had to run parallel processes to ensure that nothing fell through the cracks.

## Our Solution

Beyond Key created a personalized volunteer onboarding add-in that was integrated within the client's existing Office 365 ecosystem. It provides smart onboarding tools to engage volunteers like information about their role, allowing them to view tasks and speed up productivity with learning resources through which volunteers learn their jobs faster and engage in a better way.

- ➡ Role-based access to admin, HR, department admins, reporting manager, and task assignees.
- ➡ Personalized look and feel of the add-in, features like color theme, company logo, and date format based on the location.
- ➡ Manage task categories: pre-joining, on-joining, post-joining.
- ➡ Easy standard tasks creation and assignment and group tasks into task templates for easy assignment.

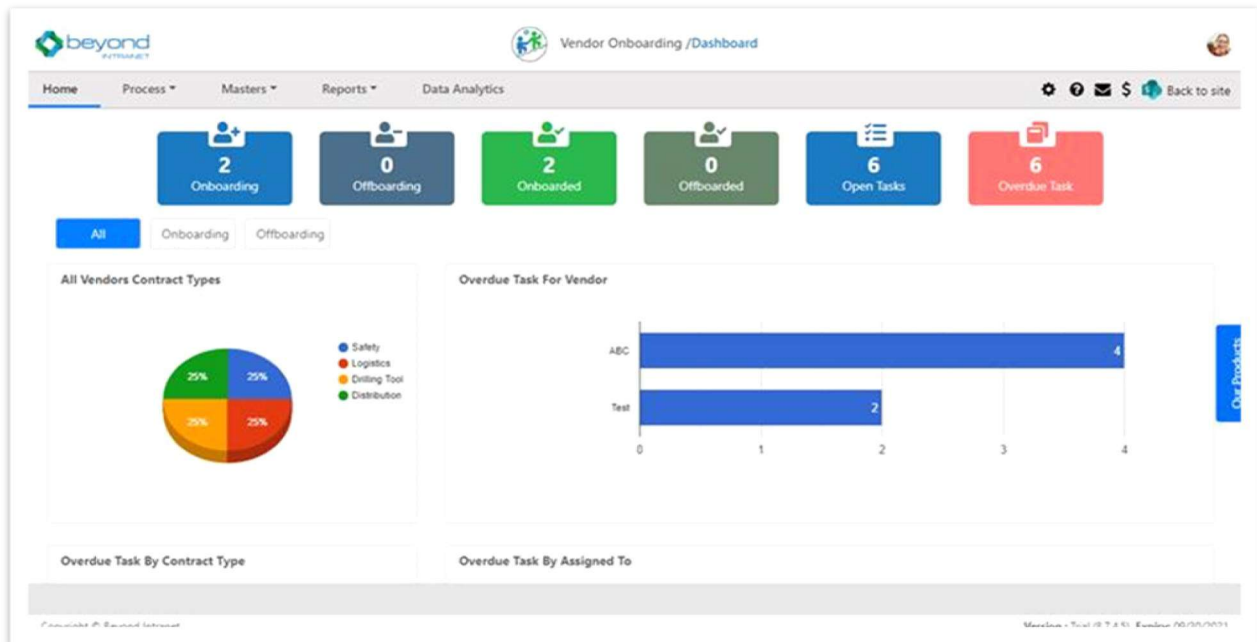
## Technology



## Results

- The NPO onboarded new volunteers with a complete, comprehensive, and efficient onboarding experience.
- Automated HR onboarding tools eliminate paperwork and collect relevant employee/volunteer information even prior to joining.
- Communicated key information with relevant departments and initiating necessary action.
- Their IT and HR departments were able to make onboarding more convenient and accessible, allowing them to do their jobs faster and more efficiently.
- The volunteer management teams could get vital information about volunteers faster and more accurately.
- The non-profit organization could ensure that the compliance standards were met. They could ensure the security and privacy of volunteers' and internal information.
- Many hours of signing and filing paperwork could be eliminated, and new hires could integrate faster into the organization.
- It also helped the NPO to seamlessly engage many departments, to ensure the new hire receives the necessary tools and access to start work.
- Every individual involved in the onboarding process from new volunteers, hiring managers, and HR executives across the organization got the right information and tools to be on the same page.

# At a Glance



**Vendor Onboarding /Onboarding**

Home | Process | Masters | Reports | Data Analytics

Basic Information | Tasks

User Type:  SharePoint User  Other

Vendor Name\*

Department:

Contract Type:

Vendor Type:

Date Of Joining\*

Personal Email:

Contact Number:

Alternate Contact Number:

Reference:

Location:

Onboard Start Date\*

Reporting Manager\*

Remarks:

Attachments  No file chosen

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