

Onboarding & Lifecycle Management



Engage new hires and manage essential tasks more effectively at every stage of the employment life cycle.



Get new hires started faster

Cezanne HR's module for employee onboarding & lifecycle management combines easy-to-manage welcome portals with unparalleled flexibility for task management, so you'll find it easier to create great onboarding experiences and keep on top of essential employee lifecycle events.

Designed to be used alongside the core People module, it takes advantage of the data you already have in your Cezanne HR system to streamline administration and connect new hires with your organisation and their colleagues.

It's a smart, effective way to ensure that essential administrative tasks don't get overlooked, new staff are engaged with your business before they join, and settle in faster once they start.

Showcase your company

In just a few minutes, you can set up user-friendly welcome portals that showcase your unique company culture and values.

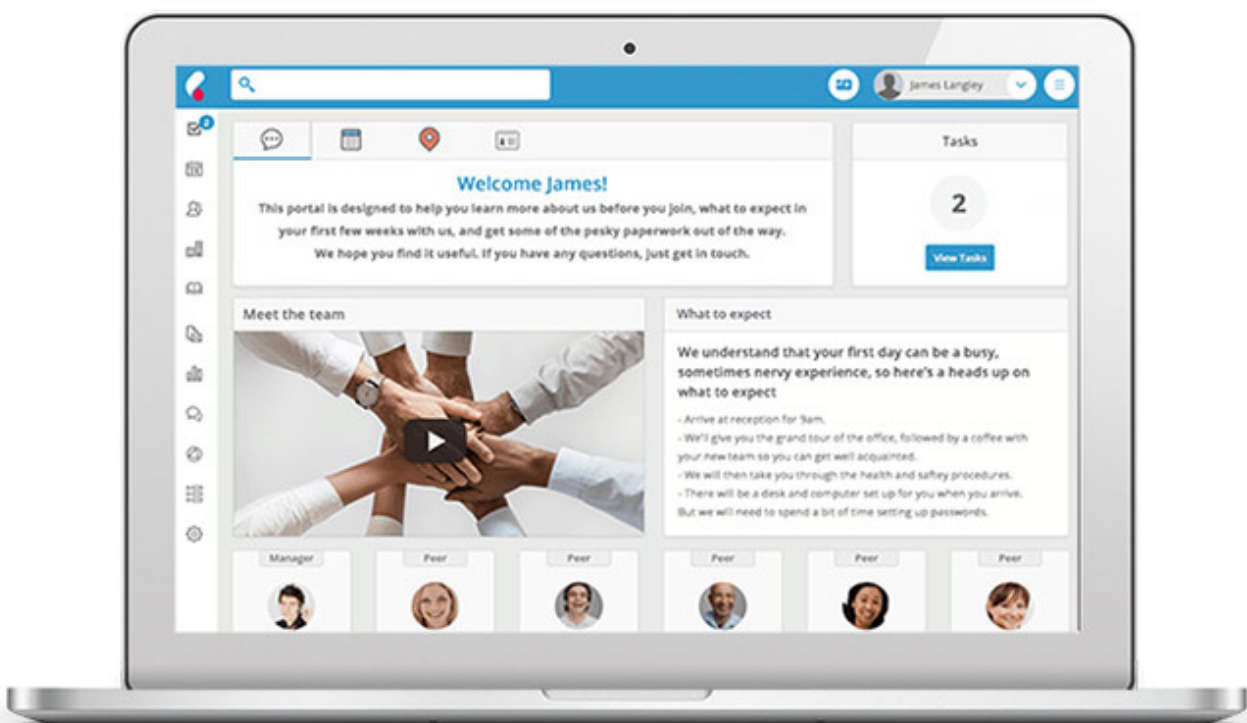
It takes just moments to embed company videos, upload photos and add copy. Contact details and team profiles can be pulled through from your core People module, and the system dynamically generates location maps.

Welcome portals can be tailored to different groups of employees to reflect different roles, locations and languages, and used at different stages of an employee's lifecycle. For example, to help 're-board' employees moving to a new part of the organisation, or returning to work after maternity leave or another period of absence.

Take control of all essential tasks

With the Onboarding & Lifecycle module, you'll find it easy to orchestrate the activities required to ensure other important employee lifecycle events run more smoothly too.

From promotions, relocations and changing to work from home, through to reducing hours or retirement, you can set up task list templates that boost efficiency and save everyone time.



Fit to your approach

You'll find it is straightforward to set up as many different task lists as you want, each with its own activities, due dates and participants.

Task lists act as templates, helping to standardise processes, but giving you the freedom to vary them should you need to.

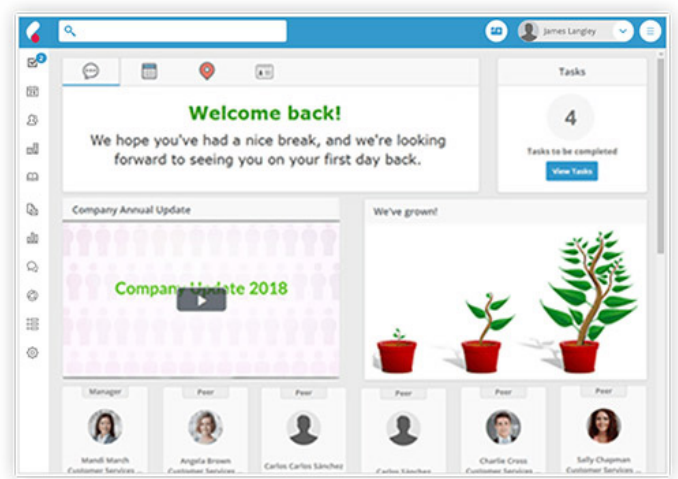
For example, you could create a standard new joiner task list that, at the appropriate time, notifies:

- The new joiner of the activities or information they need to complete before and when they join
- Their line manager that they need to arrange introductions, inductions and check in meetings
- Someone in IT or facilities management to make sure the right equipment is set up
- Payroll to ensure the appropriate paperwork is in place
- Yourself to remember to check on right to work documentation, probation periods etc.
- You can then edit the task list to add or remove activities on a case-by-case basis

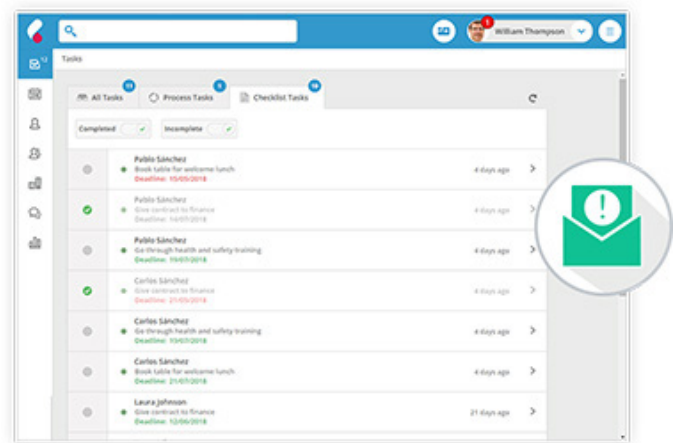
Keep everyone on track

As individual tasks are triggered, the system automatically sends out notification emails, and updates the welcome portals and employee task inboxes. Once an activity has been completed, participants simply check it off in their task list and your view is updated too.

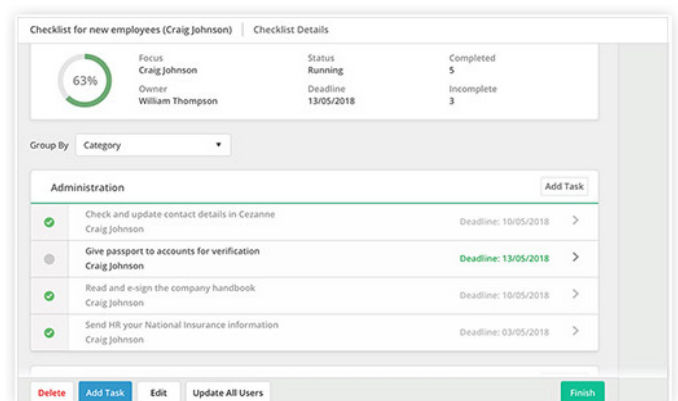
It is the simplest way to ensure everyone knows what is expected of them - and for you to see which activities have been completed, and what needs chasing up.



Tailor portals to reflect different languages or events event



Let participants quickly see their outstanding activities



Easily check on the status of running check lists

Features overview

- **Welcome portals:** easily set up portal templates and tailor them to different employees
- **Portal invitations:** automatically send out emails with portal links and login details
- **First-time greeting:** display a personalised message, and set the right tone from the very start
- **Quick summary:** ensure essential information is easy to see, such as start date, primary contact, office location and arrival instructions
- **Dynamic “to be completed” task count:** ensure it's easy to see and action key tasks
- **Configurable content areas:** add and re-arrange as many content areas as you want for embedded videos, photos or text
- **Team introductions:** automatically display photos and profiles for managers and peers
- **Portal delegation:** nominate other users to be responsible for personalising portal content
- **Task list templates:** create a library of task templates that you can select from and then customise for specific employees if you need to
- **Task assignment:** have the system dynamically allocate tasks based on the reporting relationships and roles in your core Cezanne HR system, or select named individuals
- **Task categorisation:** define and group tasks into categories to help with management and monitoring. For example, compliance, policies, payroll, IT etc.
- **Notifications:** automatically triggered emails and task inboxes make it easy to see and action to-do-lists
- **Track progress:** view and sort tasks by category, participant, due date and status, so you can see what has been done and what needs chasing up
- **Built for the Cloud:** achieve more with a system that's been built from the ground up to take advantage of the latest web and mobile technologies
- **UK & international:** powerful global features and multiple language translations included at no extra charge
- **Modular & scalable:** built to help you grow. Add employees, divisions, companies, countries, and new modules when you need them
- **Comprehensive & configurable:** straightforward for you to set the system up to work your way
- **Regular updates:** benefit from free, seamless delivery of the latest features, so you never get left behind
- **Secure by design:** GDPR compliant, with role-based access and advanced security at every level
- **Connect from anywhere:** use from your PC, Mac, tablet or smart phone
- **Intuitive self-service:** connect and engage employees, wherever they are
- **Approval workflows:** route tasks and authorisations to the right people at the right time
- **Alerts & notifications:** never miss an important date with automatic emails, reminders and tasks
- **Integrations:** benefit from an open API, single sign on, dual authentication, one-click export to Excel, and a host of other integrations, including payroll
- **Transparent pricing:** no upfront fees or hidden extras. Check out the subscription fees on our website
- **Trusted worldwide:** join tens of thousands of users in the UK and over 80 countries around the world
- **Fast to deploy and easy to manage:** our expert team can help you get up and running in no time at all. We'll even upload your core HR data for you for free

Visit our [website](#) to find out more about how we support you.

About Cezanne HR

We've built something special at Cezanne HR; a powerful, configurable HR software solution that's simple to deploy, easy to manage and remarkably cost-effective, whatever the size of your business. As a team, we've a long track record of delivering successful HR solutions to businesses worldwide. We've worked with companies of every size and across every business sector. That's why we decided from the very start to build an exceptionally robust and scalable SaaS platform for human resources management which, like our customer community, is growing all the time.