Use Case 2: Internal Employee Onboarding Across Departments

TaskAtlas runs one standard onboarding workflow across HR, IT, facilities, payroll and the hiring manager, and emails the next team the moment each step is done.

Illustrative scenario: for this use case we will use Calderwood Engineering as an exampe, and all figures are estimates for demonstration, not measured results.

At a glance

Company	Calderwood Engineering
Industry	Engineering consultancy
Size	220 staff across 3 offices
Volume	About 8 new hires a month
Workflow	Internal employee onboarding
Departments involved	HR, IT, facilities, payroll, health and safety, hiring manager
Triggers	Email notifications when each step completes

The challenge

A new hire at Calderwood touches six teams before their first day, and today the only thing connecting them is HR's email thread.

- **Too many hands.** HR, IT, facilities, payroll, health and safety and the manager each own a piece, and each works from their own list.
- **Steps fall through.** A laptop isn't ordered, building access isn't set up, or safety orientation is missed, and nobody notices until day one.
- **Constant chasing.** HR spends hours every week asking "Is the account ready?" and forwarding the same details to each team.
- **No consistency.** Each office onboards a little differently, so the experience depends on who happens to be handling it.

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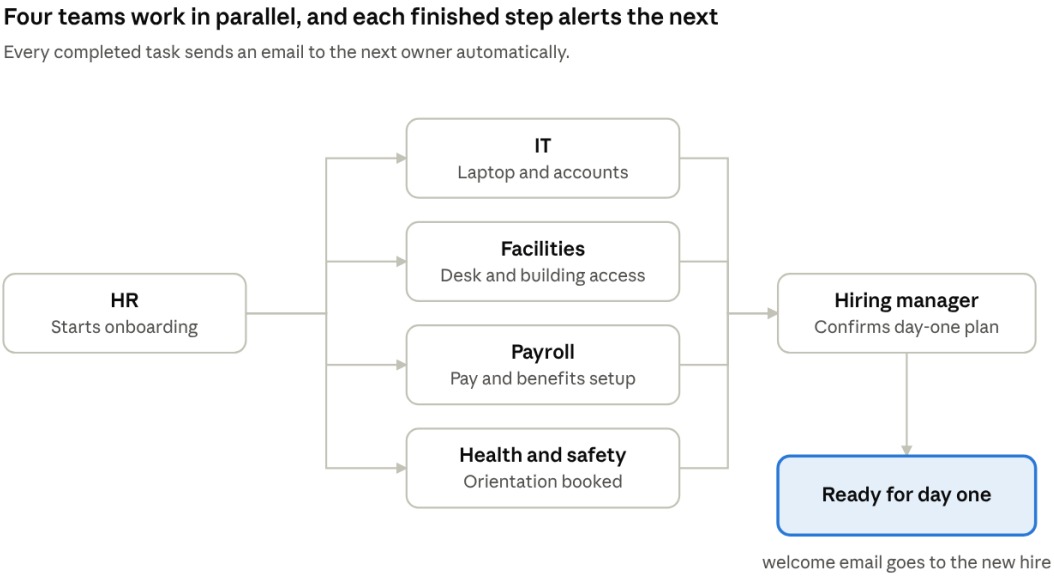
The workflow

HR starts one onboarding request, four teams work on it at the same time, and each finished task emails the next person automatically.



internal onboarding · 6 teams, 4 in parallel

1. **HR starts onboarding.** HR enters the hire's name, role, office and start date, and picks who handles each department's tasks for this person.
2. **Departments work in parallel.** IT, facilities, payroll and health and safety each get their task, due date and an email at the same moment.
3. **Email triggers on completion.** When a team marks its task done, TaskAtlas emails the next owner and updates the live journey for everyone.
4. **Manager confirms.** Once all four teams are done, the hiring manager confirms the day-one plan.
5. **Ready for day one.** The workflow closes, and a welcome email goes to the new hire.

Controls and audit trail

Every onboarding follows the same approved steps, and the record shows exactly who completed each one and when.

- **Standard template.** One published workflow for all three offices; changes go through the workflow owner.
- **Named owners per step.** Each task is assigned to a specific person, not a shared inbox, for this hire.
- **Due dates and reminders.** Tasks are due relative to the start date, with reminder emails before they're late.
- **Completion log.** Every task records who completed it, when, and any notes, such as the laptop asset tag.
- **Access tied to the record.** System access granted during onboarding is listed on the record, which makes offboarding and access reviews easier.

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Illustrative impact

At 8 hires a month, automatic handoffs would give HR back roughly 20 hours a month and make "ready on day one" the norm.

Measure	Before TaskAtlas	With TaskAtlas (estimated)
HR coordination time per hire	About 3 hours of follow-up	About 30 minutes
HR coordination per month	About 24 hours	About 4 hours
New hires fully set up on day one	About 7 in 10	About 19 in 20
Status updates to the manager	On request, by email	Live, always visible
Same process in every office	No	Yes

Assumptions: 8 hires a month; time saved comes from removing manual forwarding and status chasing. Replace with real pilot data before quoting externally.

Demo script

About five minutes; the moment that lands is completing one task and watching the next team's email go out.

1. **Set the scene (30 sec).** "Six teams touch every new hire at Calderwood, and today they coordinate by email. Here's the same hire in TaskAtlas."
2. **Start the onboarding (1 min).** As HR, start the workflow for a new hire. Pick who handles IT, facilities and payroll for this person; the template stays the same.
3. **Show the live journey (1 min).** Open the journey view: HR is done, and IT, facilities and payroll are working in parallel, each with an owner and due date.
4. **Complete a task (1 min).** Switch to the IT user and mark "Laptop and accounts ready," adding the asset tag. Show the email that just went to the manager.
5. **Show the dashboard (30 sec).** HR's view of every hire in progress, with anything overdue flagged.
6. **Show the record (30 sec).** Who did each step, when, and which systems were granted.
7. **Close (30 sec).** "Same template, any company, any department. Onboarding is just where it starts."

Why it matters

Onboarding is the problem every growing company already feels, which makes it the easiest first sale and the doorway to every other workflow.

- **Universal pain.** Every company that hires needs this; it isn't tied to one industry.
- **Cross-department by nature.** It shows off TaskAtlas's core strength, handoffs between teams, in the first demo.
- **Land and expand.** Once HR, IT and facilities work in TaskAtlas, offboarding, equipment, access and leave requests follow on the same platform.

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