

Evaluating Journey: a guide for HR, managers, stream owners and IT

Journey is employee onboarding for Microsoft 365. It's a solution accelerator: the foundation is already built, and iomer builds your organization's version as a single deployment package and installs it in your tenant. Use this guide to run a fair evaluation, prepare for a walkthrough, and build a business case on your own numbers.

1 · WHAT TO CHECK

A checklist for each person evaluating Journey

Bring these to the walkthrough. Each item is something you can see for yourself, in your own brand colours.

HR and People Ops

- ☐ Build a short stream with a reading task, a form to upload, a policy to acknowledge and an approval. Set due days from the start date.
- ☐ Create a rule (for example a location) and assign a journey to a group. Does the check name who is left out?
- ☐ Return an uploaded form with a reason. What does the new hire see?
- ☐ Filter reports by start date and location, then export to CSV. Does the file list its filters?

Line managers

- ☐ Can you see who on your team is behind, and on what?
- ☐ Remind someone, extend a due date and record a paper acknowledgement. Is each one on the record, and is the person told?
- ☐ Approve a probation or competency sign-off. Do you see what the new hire wrote, and who decides next?
- ☐ Hand your approvals to a colleague while you're away.

IT, safety and other stream owners

- ☐ Open your stream's completion matrix. Can you see every new hire against every task?
- ☐ Find the tasks your team must do, such as laptop set-up, and mark one done.
- ☐ Answer a new hire's question on a task. Where do they see the answer?
- ☐ Approve an access review or competency sign-off at your level.

IT and the Microsoft 365 owner

- ☐ What exactly does iomer install, and where does it run?
- ☐ Where is the data stored, and how are task records and uploads secured?
- ☐ Which Microsoft 365 plans, connectors and service account do the flows rely on?
- ☐ How is the design sized to your hiring volume and SharePoint's permission limits?
- ☐ How do changes and Microsoft 365 updates reach you, and how is it removed?

What auditors ask for, and where Journey keeps it

Safety certification audits, regulators and internal auditors tend to ask the same questions about new staff. Here is where each answer comes from.

THE QUESTION	WHERE JOURNEY KEEPS THE ANSWER
Did this person complete orientation?	Every task in every stream of their journey, with its status, completion date and who completed it. Reports filter by person, location and start date.
Did they acknowledge the policies that apply to them?	Each acknowledgement records the typed name, the time and the document version, against versioned documents in the policy library, and stays tied to the version shown.
Who approved their probation, access or competency?	Each approval sign-off keeps its levels in order, who decided each one, when, and any comment. Nobody decides two levels of one item, or their own.
Was anything recorded on their behalf?	Tasks and paper acknowledgements recorded by a manager are marked with who recorded them and why, with the scanned form, and the person is told.
Has the record been changed?	The audit log records every acknowledgement, decision and change, can't be edited, and can be filtered and exported.
Who can see their documents?	Uploads sit in a private folder visible only to the new hire, their manager and HR. Task records are secured to the new hire, their manager and stream owners.

A typed-name acknowledgement is a record that someone acknowledged the policy, not proof that they understood it, which is why new hires can ask the owner a question first. Formal policy sign-off across the organization, including everyone signing a new version again, is what iomer's Beacon does. Journey supports a safety or compliance program; it doesn't make an organization compliant on its own.

Why onboarding is worth measuring

FINDING	SOURCE
Only 12% of employees strongly agree their organization does a great job of onboarding new employees.	Gallup, 2018
When managers take an active role in onboarding, employees are 3.4 times as likely to say it was successful.	Gallup, 2021
Only 29% of new hires say they feel fully prepared and supported to excel in their role.	Gallup, 2021
Employers have about 44 days to influence a new hire's long-term retention.	BambooHR, 2023 (survey of 1,565 US workers)

Questions to answer as a team

You don't need every answer for a first conversation. They tell us both how Journey fits, who should be involved, and how big the job is.

QUESTION, AND WHAT THE ANSWER TELLS US		YOUR ANSWER
1	Walk us through what happens from offer accepted to day 90. Who does what? Gives us the streams we'll build. Three or more teams involved is a strong fit.	
2	Where does onboarding live today? Spreadsheets and email mean an easy win. An HR system checklist means Journey takes the work side, fed by the HR system.	
3	How many people do you hire a year, and do they start in waves? Volume shapes the list design, archiving and the business case.	
4	Which policies must new staff acknowledge, and does anyone ask for proof? Audit, safety certification or regulator pressure makes acknowledgements by version important.	
5	Do any onboarding steps need approval? How many levels? Probation sign-off, access requests and competency sign-offs are common.	
6	How reliable is the manager field in your directory? If it's patchy, we plan approver lists as a fallback.	
7	Does every new hire have a Microsoft 365 account on day one? Journey works from the day the account exists. Staff without accounts need licensing or a manager to record for them.	
8	What HR system do you use, and does it trigger anything today? A new-hire event or group membership can start journeys automatically. Integration is scoped separately.	
9	What do managers ask for that they can't see today? Usually "who on my team is behind". That's the My team view.	
10	What would HR or leadership want in a monthly report? Confirms the report filters, and whether a Power BI dashboard is worth adding.	
11	Which intranet platform are you on? Native SharePoint is the cleanest fit. On Powell or Omnia, we look at the platform's own onboarding features first.	
12	Who owns onboarding across HR, IT and the business? No owner, no success. If ownership is unclear, it's the first workshop topic.	

Measure today, then again 90 days after launch

Use your own numbers. iomer doesn't supply industry benchmarks for these, because they vary too much between organizations to be useful.

MEASURE	HOW TO MEASURE IT	TODAY	90 DAYS AFTER LAUNCH
People hired per year	From your HR system, and how many start in waves		
Teams involved in each person's onboarding	HR, IT, safety, facilities, the department		
Days from start date to laptop and accounts ready	From your last ten hires		
New hires with every required policy acknowledged by day 30	From personnel files or your tracking spreadsheet, as a percentage		
Hours a month chasing onboarding status	Ask HR, IT, safety and managers		
Days to assemble one person's onboarding record for an audit	Ask HR, safety or internal audit		
New hires who left in their first 90 days	From your HR system, last 12 months		
Cost of replacing one employee	Your own estimate; Gallup (2019) puts it at one-half to two times annual salary		

Time spent chasing, per year = hours a month chasing onboarding status × 12.

Cost of early turnover = new hires who left in their first 90 days × your cost of replacing one employee.

5 · NEXT STEPS

From first call to proposal

1

Discovery call

How onboarding works today and what matters most.

2

Walkthrough

Thirty minutes with Journey, in your own brand colours.

3

Discovery workshop

Your streams, approvals, policies and forms, mapped into a stream design.

4

Proposal

A work estimate and a written proposal with a timeline.

Book a walkthrough at www.iomer.com/accelerators/journey/contact.html, call **780.424.3122** or email contactus@iomer.com.