

AVIONTÉ CONNECT



CONNECT DAY 3

What's Next for Onboarding

See how Flows performs with one of your most critical workflows: Onboarding

- *This presentation is for informational purposes only.*

Introductions

Welcome to **CONNECT!** Thank you for joining our session.



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VP, PRODUCT

PRODUCT



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PRODUCT OWNER

PRODUCT

The Agenda

1

Onboarding Automation Today

2

Staffing Agencies' Realities

3

The Flow Experience

4

The Future of Flows

5

Q&A: Where Onboarding Flows Meet Reality

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Onboarding with Avionté Today

Key metrics from the current one-click, manual onboarding process



Tasks

2.5M+

Sent per month



Average

2x

Higher talent
completion rate when
tasks are sent as
workflows



Average

27%

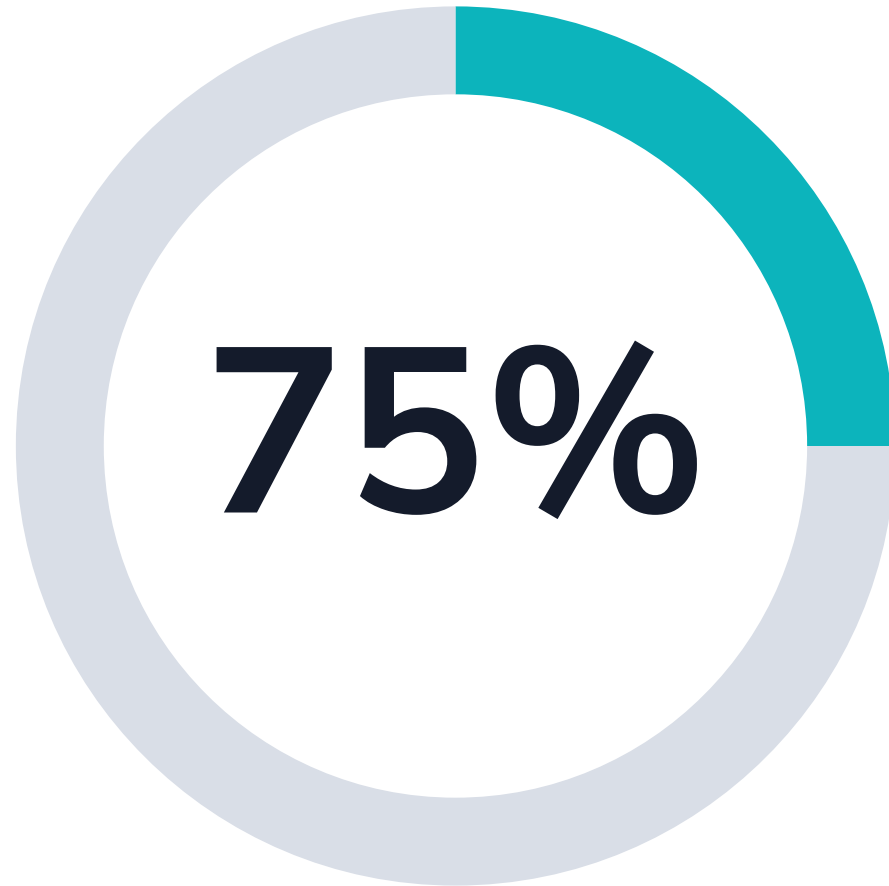
Completion rate on
tasks



Average

54%

Completion rate on
workflows



Agencies still using
predominantly manual
task administration

The Reality for Agencies

Compliance

Onboarding is a critical part of your operations – tax forms, payroll waivers, state or job specific forms. Individual sends and decisions increase risk

Speed

Speed to fill is held back by completion of onboarding. Automatically deployed, quickly filled, easy to navigate onboarding makes a difference

Duplicates

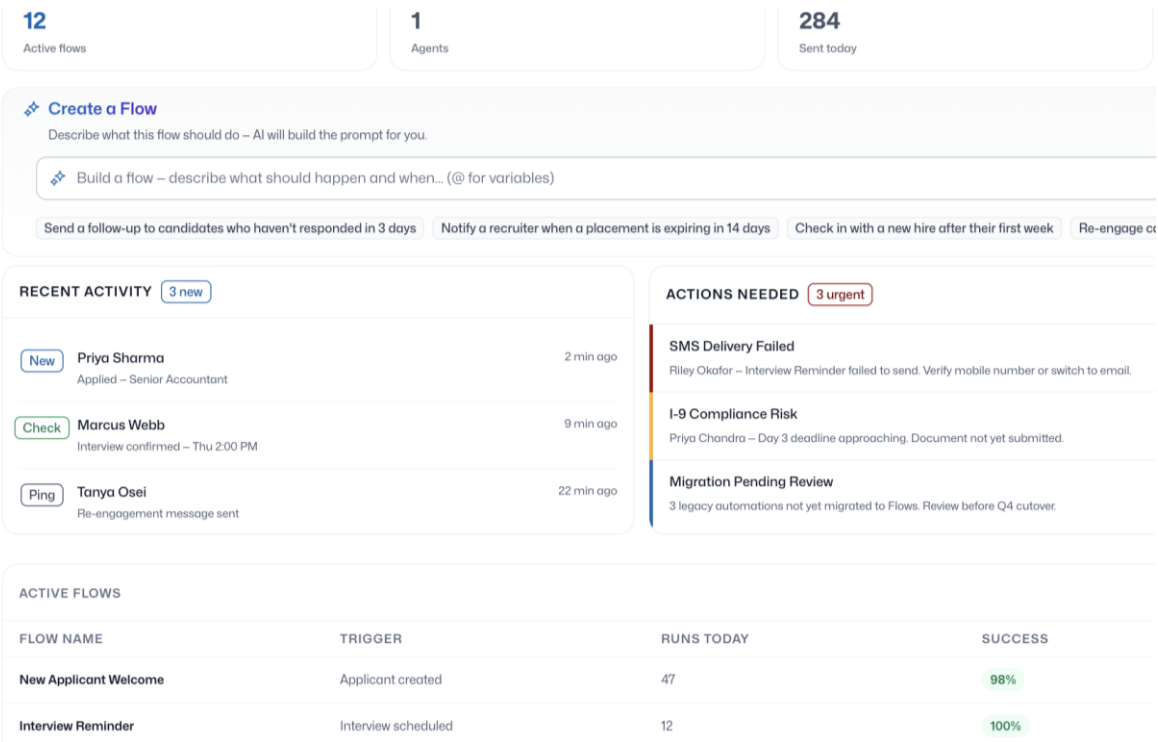
Asking talent to re-fill data they have previously filled out is a major irritant and drop off point for talent

18% of drop off for applicants happens at onboarding



Avionté Flows

A single orchestration layer across our entire platform that drives automation end-to-end.



01.

Command Center

Manage and action your automation/AI data

02.

Flows Builder

Build with AI, Templates or from Scratch

03.

Visibility & Sharing

Complete audit logs across flows and into activities

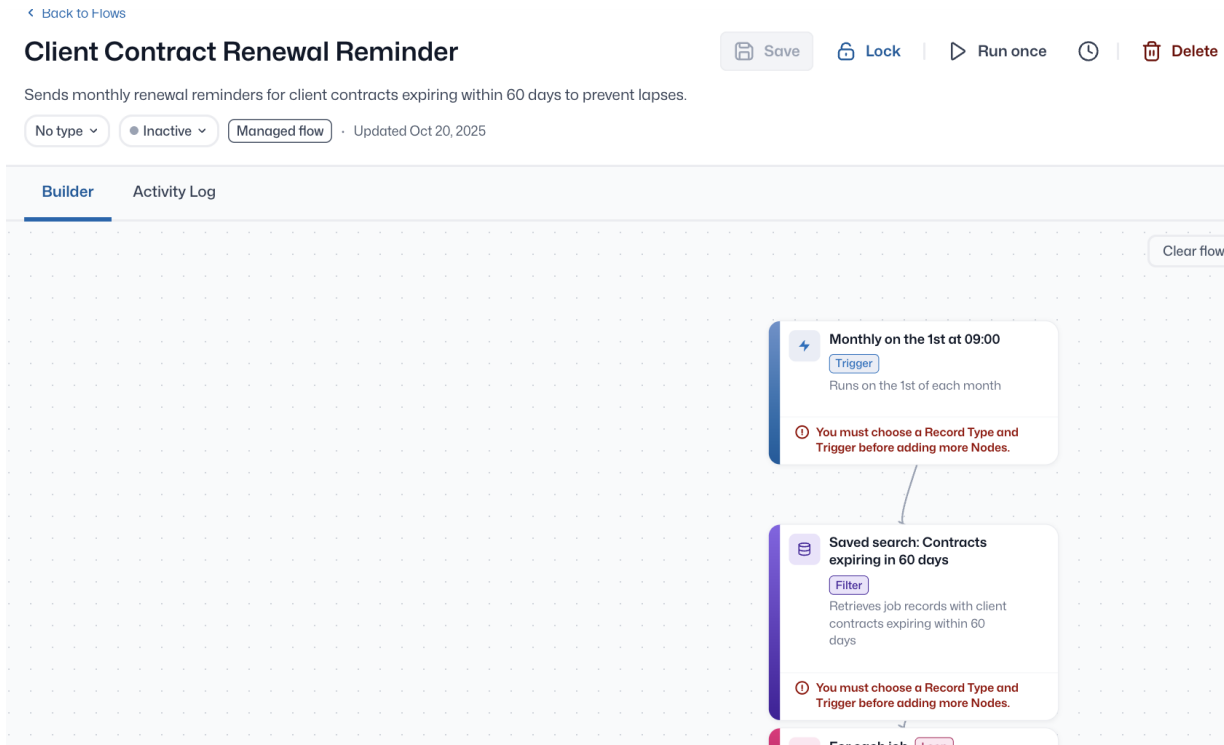
04.

Migration

Self-migrate your existing automations across the platform when you're ready

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Weekly Check-in: Assignments Ending

Complete

X

Started

Mar 30, 2026 9:00 AM

Duration

4.2s

Entity

Placement

Run ID

r-09

STEPS

✓

Every Monday at 9:00 AM

Schedule fired

0.1s

✓

Saved search: Active Placements

18 records retrieved

0.7s

✓

For each talent

18 iterations

0.1s

✓

Create activity

18 activities created: "Weekly placement check-in"

3.3s

Open in flow →

Close

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Automation

Talent Engagement Notifications

Legacy 10 notifications

These notifications are moving to Flows

Migrate each notification to create a Communication Flow. After migration, this record becomes read-only and a link back to it is preserved on the new flow.

Migrate All (10)

Notification Name	Status	Trigger	Schedule	Created By	Sends	
5/13 New Applicant	Active	Application Received	When	Kiersten Jensen	1	Migrate to Flow
6 Month Inactive Nudge	Active	Talent Inactive 6 Mo	Weekly	Dan Sanchez	2	Migrate to Flow
Application Received (DO NOT USE)	Inactive	Application Received	When	Kanav Mehra	1	Migrate to Flow
Arrivals	Active	Talent Status → Active	When	Shoua Vang	1	Migrate to Flow
Birthday	Active	Birthday	Daily	QA Smithy	1	Migrate to Flow

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Triggers

Additional options of pipeline stage and workflow completion



Conditions

Options of worksite location, skill tags, talent tags, job type



Actions

Connect to Chat and use Groups or individuals, alert users by email, and add talent tags

What's New in Flows for Onboarding

We've got great existing functionality in Onboarding Automation and we've added even more.

The Administrator's Story

Rachel, an Administrator at Bubbles Staffing — a mid-sized staffing agency operating across the Midwest — is about to get a pressured phone call from the COO.

“Manual onboarding is great — but we need to get this automated by Monday’s Executive Meeting.”

— The COO of Bubbles Staffing, Friday at 2:30pm



What Does Your Weekend Look Like Now?

Four things standing between Friday afternoon and Monday's Executive Meeting.

01

Build the Flow

Configure the automation — trigger, conditions, actions.

02

Test the Flow

Confirm it fires exactly as expected before anyone sees it live.

03

Communicate

Brief the COO, plus the ground-floor teams who've run this manually until now.

04

Monitor Go-Live

Block time Monday to watch it run and catch anything that needs a human.

Building the Flow: Who Gets Onboarding

Location Routing

- Bubbles Staffing operates mostly across the Midwest
 - The Flow checks the Job's worksite location and the Talent's location
 - Minnesota jobs trigger the Minnesota workflow (general + MN-specific tasks)
 - Wisconsin jobs trigger the Wisconsin workflow (general + WI-specific tasks)

Job Type Filter

- Onboarding only fires during Job candidacy, once Talent is nominated
- Bubbles Staffing staffs Contract, Contract-to-Perm, and Direct Hire work
 - The Flow is scoped to Contract and Contract-to-Perm jobs only
 - Direct Hire and headhunting placements are excluded

Building the Flow: What Happens at Completion

Three things fire automatically the moment onboarding is done.

Stage Update

A workflow step card with a light blue background. It features a green play button icon on the left, a title 'Set Nomination Stage' with a trash icon on the right, an 'Action' label in a green box, and a description 'Move a Talent into a nomination stage for a Job.' Below the card is a dashed circle with a plus sign.

Talent automatically moves to the 'Onboarding Complete' nomination stage upon onboarding completion.

Notify the Rep

A workflow step card with a light gray background. It features a green play button icon on the left, a title 'Notify Internal User' with an 'Action' label in a green box, and a description 'Notify an internal user about this flow.' Below the card is a dashed circle with a plus sign.

The Talent's Representative gets an alert the moment onboarding wraps up.

Notify User Group

A workflow step card with a light blue background. It features a green play button icon on the left, a title 'Notify Internal User' with an 'Action' label in a green box, and a description 'Notify an internal user about this flow.' Below the card is a dashed circle with a plus sign.

The Back Office group is notified to review this candidate's Direct Deposit — before their first week in Time Entry, not after.

One workflow now closes the gap where Back Office used to learn about a new hire only once they were already processing Time Entry for the week.

MONDAY, 2:00 PM

Milestone Delivered

The Flow was built, tested, documented, and communicated before Monday.

Monday morning, you (the Admin) check the Activity Log a few times, answers a couple of questions in the inbox — and the COO walks into the Executive Meeting to boast about the administrative execution.

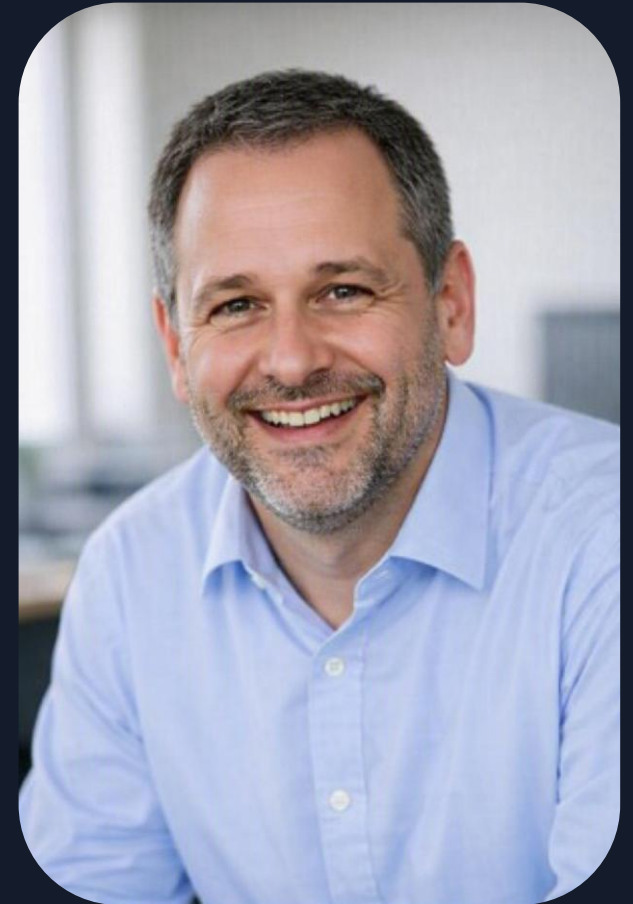
Zero manual sends. One less thing to keep you up at night.

The Talent's Story

Theo applied for a role at Bubbles Staffing he's confident he's right for. Today, he's meeting with his recruiter, Rachel, to make his case in person.

“I think I'd be a great fit for this role!”

— Theo

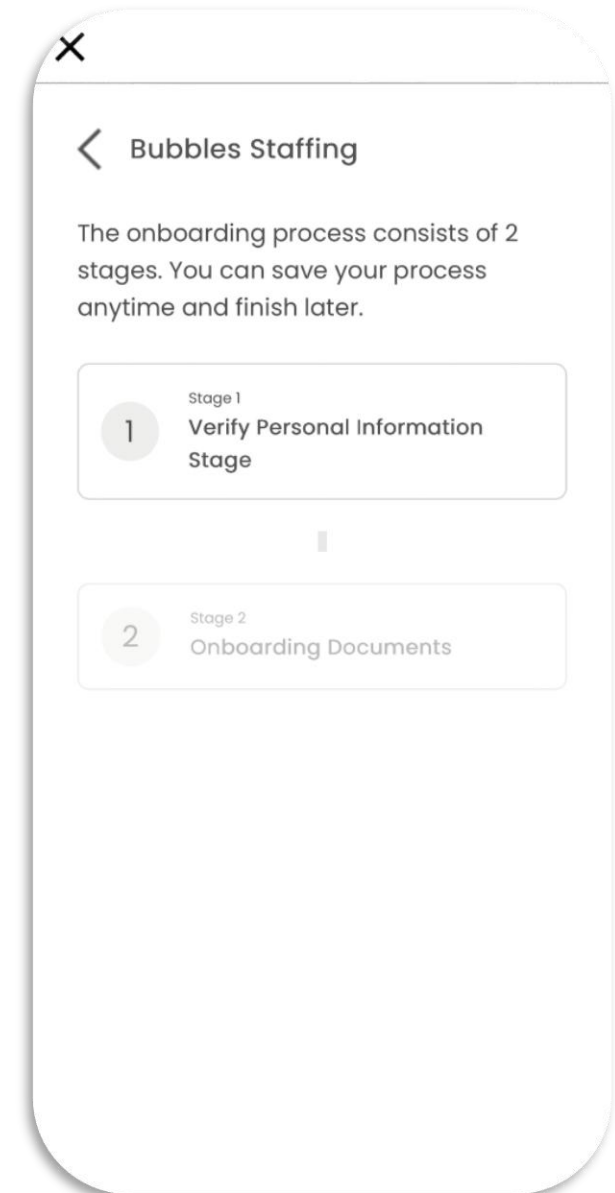


While They Talk, the Flow Moves

As Rachel and Theo talk through the role, she makes a few clicks, advancing Theo's nomination in the pipeline. Theo doesn't notice a thing.

Key Moment

Theo's phone lights up mid-interview — a nomination stage change was all it took to send the onboarding Flow.



Signed, Sealed, Delivered – Right There in the Chair

Rachel keeps talking. Theo keeps tapping. By the end of the interview, the paperwork is already done.



Waivers & Policies

Reviews and signs the standard agency waivers and policy acknowledgments.



Background Check Consent

Gives consent so the recruiter can initiate the background check the moment forms are complete.



Form I-9

Completes the I-9 as proof of identity and work eligibility.



Federal & State W-4

Completes tax withholding elections for both federal and state.

Background Check: Clear – All Systems Go!

What Theo Sees

- Sits down for an in-person interview with Rachel
- Talks through the role while signing a few quick forms on his phone
- Rachel confirms he's a great fit

What the Flow Does

- Sends when Rachel advances Theo's nomination stage
- Alerts Theo's phone that the onboarding package is awaiting his action
- Upon completion, automatically progresses Theo to the next nomination stage

ON HIS WAY OUT

"Congratulations!"

One interview – Theo walked in hoping for a shot and walked out fully onboarded. Waivers signed, background check clear, tax forms completed — before he'd even left the building.

Theo's out the door and now employed!



WHAT WE'RE BUILDING

Real Stories. Your Toolbox.

Bubbles Staffing is hypothetical and you are not.

Every agency runs onboarding a little differently. What matters isn't matching their story exactly — it's knowing what's in your toolbox when you go to write your own.

Different people. Different workflows. Same toolbox underneath.

Triggers: What Starts the Flow

Four ways to initiate onboarding – via UI or API

01

Application Received

Flow can trigger when a Talent completes an application for a Job.

02

Talent Status

Flow can trigger when an applicant's talent status changes to a specific status.

03

Nomination Stage

Flow can trigger when an applicant moves to a nomination stage, including the initial Nominate stage.

04

Pipeline Stage

Flow can trigger when an applicant moves to a pipeline stage, including the initial Pipeline stage.

Workflow Completion is also available as a trigger — but only to fire the next step within an existing onboarding Flow, not to start one.

Conditions: Who Can Receive a Package

Three carried over from today, four new ways to narrow the Flow audience.

Carried Over

Talent Home Office

e.g., Talent's home office is under the Bubbles Staffing employer → send a package branded for the Bubbles Staffing employer

Talent Address

Country and state/province matching against the Talent's home address

Company / Company Office

Matches against a configured hiring company or office

New

Worksite Location

Geographic logic on the job's worksite (country and state/province) — distinct from the Talent's home address

Job Type

Contract, Contract-to-Perm, or Perm — send the packet that fits the Job

Skill Tags

Condition on an existing skill tag, e.g., 'Forklift'

Talent Tags

Condition on a tag, such as 'Spanish Language'

Actions: What Happens Next

Four existing actions and three new ways to keep people in the loop.

Carried Over

Send Onboarding

Sends a package to the applicant; 24/7 clients get it pushed to mobile automatically.

Talent Status

Changes the applicant's talent status.

Pipeline Stage

Moves the applicant to a pipeline stage.

Nomination Stage

Moves the applicant to a nomination stage.

New

Notify Talent

Give the Talent a Thank You message via SMS or Chat

Notify Internal Users

Emails a configured user or user group when a Talent completes an onboarding package.

Update Talent Tag

Add (or remove!) a tag to the Talent record — e.g., flag a reference follow-up, or a remove a tag for 'Needs Onboarding'

Example: Tags

In this example, your agency staffs both English and Spanish speakers, which you track via Talent Tags.



01. Trigger

Talent Status changes to 'Onboarding'.

02. Conditions + Action

If Talent Tag = Spanish, send Spanish package

All Else = Send English package.

03. Upon Completion

Update Talent status to 'Ready'.

If Talent Tag = Spanish, notify Spanish-language team of package completion.

If Talent Tag ≠ Spanish, notify English-language team of package completion.

Future Opportunities for Flows

Possibilities we are considering beyond current feature's scope.

01

Expiring Certification

A certification that's about to expire could trigger an onboarding task to send to active Talent.

02

Employer Updated

A Talent whose Home Office is changed to a different Employer could trigger a Flow for that employer to send.

03

Talent Skill Added

A Talent who gets a new Skill on the record could trigger an onboarding task to send to validate that Skill (e.g. Certifications Task)

04

No References

A task to collect references could send to Talent with no reference data.

What future opportunities do you see with Flows?



11

Active flows

1

Agents

284

Sent today

94.2%

Success rate

14

Pending

Create a Flow

Describe what this flow should do – AI will build the prompt for you.

Create a flow – describe what should happen and when... (@ for variables)

Send a follow-up to candidates who haven't responded in 3 days

Notify a recruiter when a placement is expiring in 14 days

Check in with a new hire after their first week

Re-engage candidates who went dark after an interview

RECENT ACTIVITY

3 new

ACTIONS NEEDED

3 urgent

View all

SUGGESTED

AI

View all

- New

Priya Sharma

Applied – Senior Accountant

2 min ago
- Check

Marcus Webb

Interview confirmed – Thu 2:00 PM

1 h ago
- Ping

Tanya Osei

Re-engagement message sent

12 min ago

SMS Delivery Failed

Riley Okafor – Interview Reminder failed to send. Verify mobile number or switch to email.

Project on track for completion. Risk of delay if not yet submitted. Review before Q4 cutover.

3 legacy automations not yet migrated to Flows. Review before Q4 cutover.

Placement Confirmation

Auto-confirm new placements day-of

Availability Refresh

Ping inactive talent weekly to update availability

Recruiter Follow-Up

Alert recruiter when talent hasn't been contacted in 7 days

ACTIVE FLOWS

View all

Flow Name	Trigger	Runs Today	Success	Status	
New Applicant Welcome	Applicant created	47	98%	Active	Edit
Interview Reminder	Interview scheduled	12	100%	Active	Edit
Onboarding Day 1 Reminder	Start date T-1	8	87%	Active	Edit
I-9 Document Nudge	Missing I-9 - day 3	5	100%	Active	Edit
Re-engagement Ping	No contact 14 days	0	91%	Paused	Edit
First Week Check-In	Day 7 post-start	6	83%	Active	Edit
Placement Confirmation	Placement created	22	94%	Active	Edit

Early Access

The image displays two overlapping screenshots of the Avionté web application. The left screenshot shows the 'Resource Center' sidebar with a search bar and a list of links: 'Product Updates' (with a red '5' badge), 'Recruiter Workflows', 'Support Center', 'Training & Events', and 'Feature Early Access Portal'. A red arrow points from the 'Feature Early Access Portal' link to the right screenshot. The right screenshot shows the 'Feature Early Access Portal' page, which includes a 'Chat' sidebar, a search bar, and a 'Submit feedback' button. The main content area is titled 'AVIONTÉ Product Roadmap Portal' and contains a search bar, tabs for 'Early Access Available' and 'Recently Released', and a section titled 'Features Available in Early Access'. This section lists three features: 'Workers Comp Codes', 'Mobile Distribution Visibility', and 'Simplified Talent Login', each with a brief description and a 'MOBILE' button.

Resource Center

- Product Updates
GET THE LATEST PRODUCT NEWS
- Recruiter Workflows
GUIDED RECRUITER BEST PRACTICES
- Support Center
AVIONTÉ SUPPORT CENTER HOMEPAGE
- Training & Events
VIEW LEARNING OPPORTUNITIES
- Feature Early Access Portal
SEE WHAT FEATURES ARE AVAILABLE FOR EARLY ACCESS

AVIONTÉ Product Roadmap Portal

Find out what Avionte is building and share feedback on new and future functionality.

Search

Early Access Available Recently Released

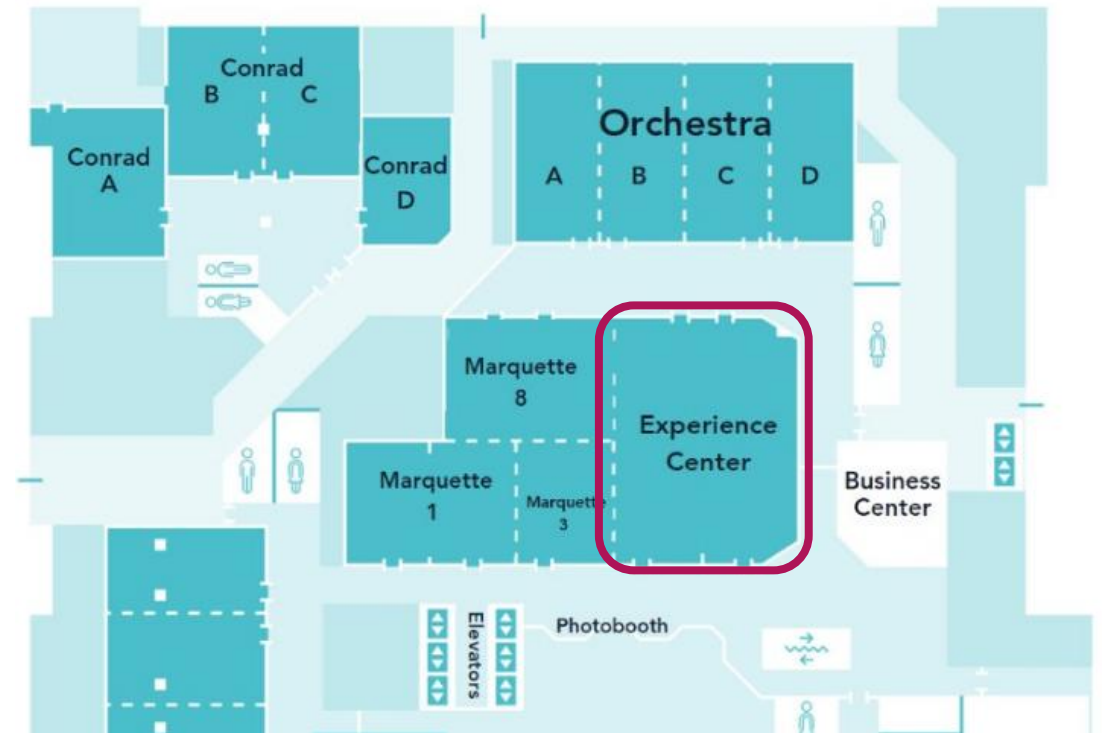
These features are either available now or will be available soon for early access. Rank a feature as "Must Have" and we'll reach out to you.

Features Available in Early Access

- Workers Comp Codes**
Managing Worker's Comp Codes
Edit and manage office-level workers' compensation codes directly in AviontéBOLD. This allows for quick updates without the need to switch between systems.
- Mobile Distribution Visibility**
Track the status and responses of mobile notifications in a dedicated section on the Job Talent Page. This allows you to monitor outreach progress without changing...
- Simplified Talent Login**
This feature will enhance our 24/7 login to prevent brute force attacks.

You can find sign up under Avi the Owl. Click **Feature Early Access portal** and look for Flows. You can submit specific asks here or talk to our team in the Product Hub.

Visit the Product Hub!



Click through the design yourself at the Product Hub in the **Experience Center (2nd Floor)**!

Q&A

Thank You

Help shape future content by rating this session.

1. Open the Bizzabo app and select Agenda
2. Locate **What's Next For Onboarding**
3. Rate and leave feedback

Rate the session



Leave further feedback...

SEND

Cancel