

Onboarding & Offboarding Management

Automate onboarding and offboarding with structured workflows and real-time visibility across teams.

SKU	BUS-HRS-ONB
Solution area	Business Operations
Works with	Employee Lifecycle Management, People Operations Hub, HR Requests & Case Management, IT Operations Planning & Analytics, Finance & Administration
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Datasheet	v1.0

What it is

Onboarding & Offboarding Management is the process of coordinating tasks, workflows, and approvals for employee entry and exit. It ensures that employees are onboarded efficiently and offboarded securely and consistently.

SmartSuite's Onboarding & Offboarding Management solution provides a structured, scalable system to manage employee onboarding, transitions, and exits across departments. It replaces manual checklists, emails, and disconnected processes with a centralized, workflow-driven system.

With a centralized workflow system, HR, IT, Finance, and operations teams gain full visibility into onboarding and offboarding progress.

Core capabilities

Onboarding Workflow Automation

Automate new hire onboarding tasks and processes.

Offboarding Workflow Management

Coordinate exit processes and responsibilities.

Task Assignment & Tracking

Assign and monitor tasks across teams.

Cross-Functional Coordination

Align HR, IT, Finance, and operations workflows.

Access Provisioning & Deprovisioning

Manage system access for onboarding and offboarding.

Compliance & Training Tracking

Ensure completion of required onboarding steps.

Checklist & Process Standardization

Standardize onboarding and offboarding workflows.

Notifications & Escalations

Ensure tasks are completed on time.

Audit Trails & Documentation

Maintain traceability for compliance and reporting.

The Onboarding & Offboarding Lifecycle

Step 1 Initiate Onboarding / Offboarding Trigger workflows based on lifecycle events.	Step 2 Assign Tasks Across Teams Distribute responsibilities to HR, IT, and operations.	Step 3 Execute & Track Progress Monitor task completion in real time.	Step 4 Validate Completion & Compliance Ensure all requirements are met.	Step 5 Finalize & Archive Records Complete process and maintain documentation.
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Who it is for

HR Teams Manage onboarding and offboarding workflows.	Hiring Managers Coordinate onboarding tasks and responsibilities.	IT Teams Manage system access and provisioning.
Finance Teams Handle payroll and asset tracking.	Operations Teams Ensure coordination across departments.	Executive Leadership Monitor workforce transitions and efficiency.

Works with

Employee Lifecycle Management Tracks employee status and transitions.	People Operations Hub Provides employee identity and role data.
HR Requests & Case Management Supports onboarding-related inquiries.	IT Operations Planning & Analytics Manages system access and provisioning.
Finance & Administration Manages system access and provisioning.	

Built differently. Onboarding & Offboarding Management runs on the same relational platform as every other SmartSuite product, so its records link to the risks, controls, issues and evidence they affect, and every report reflects the current state rather than a copy.

See it working with your data

Ask your SmartSuite account team for a demo of Onboarding & Offboarding Management configured for your organization, or read the full product entry at smartsuite.com/products/onboarding-offboarding-management.

Schedule a demo