

BUZZBOX LIVE: AI-DRIVEN PERSONALIZED ONBOARDING EXPERIENCES FOR NEW EMPLOYEES

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KEY TAKEAWAYS:

- Mid-sized firms are pressed for time, and thus immediately assign recruits to clients. New hires always come with domain knowledge – they are trained, tested, and certified.
- But what they lack is process knowledge. Big firms invest heavily in process education – in getting the whole firm to work in a standardised way.
- Onboarding is crucial, and organizations should prioritize training, processes, and organizational orientation in addition to subject matter expertise.
- Welling emphasizes that building an institution requires passion and a commitment to long-term goals, rather than focusing solely on short-term gains.
- Firms need to develop a process-driven approach to ensure consistency and quality, which results in a strong organizational culture and meeting client expectations.



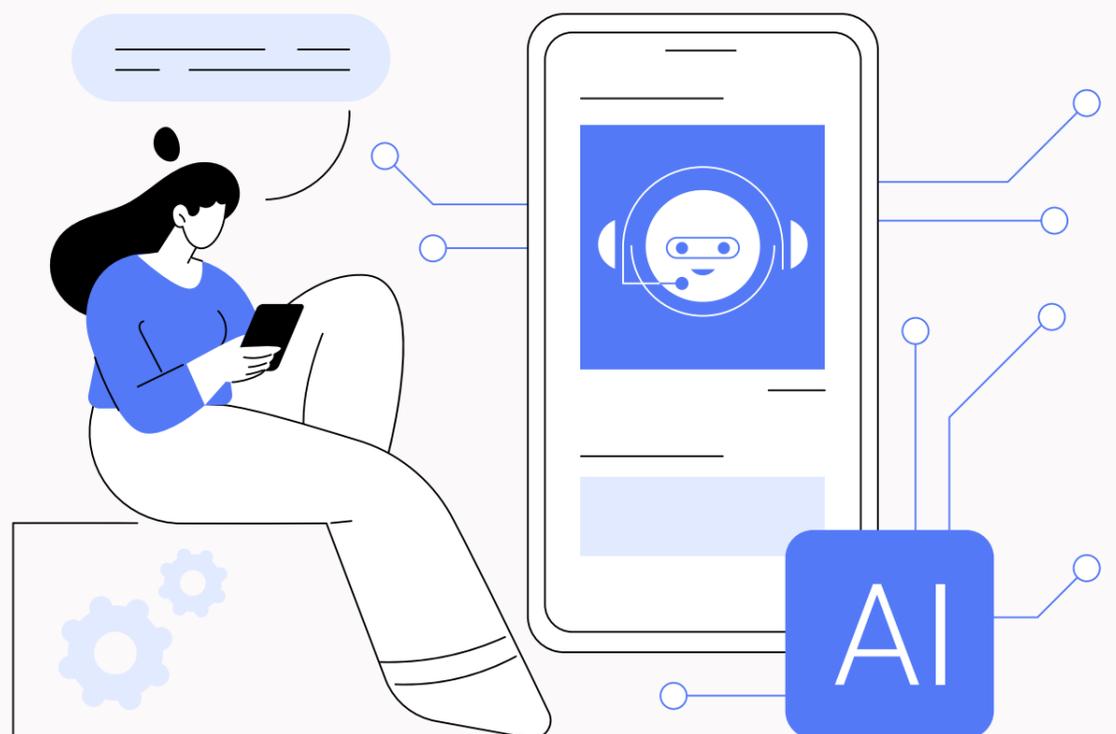
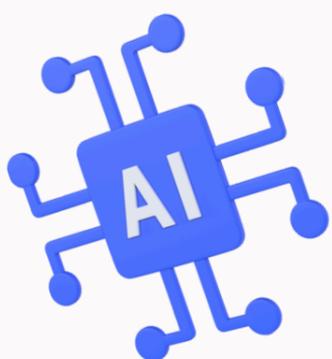
WHY ONBOARDING IS IMPORTANT?

- A good onboarding process leads to **improved efficiency**
- **Standardized service** quality
- A **stronger organizational identity** (rather than individual partner identity)
- Direct impact on the **topline revenue**.
- Enhances the **customer experience**.



HOW AI CAN HELP FOR SMOOTHER ONBOARDING?

- AI is required in **scaling efforts** – being able to hire and **train more people faster**, while **keeping costs steady**.
- It can offer a **personalized experience** to each employee.
- AI can **save time**, making **employees more efficient** and able to **focus on core work**.



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