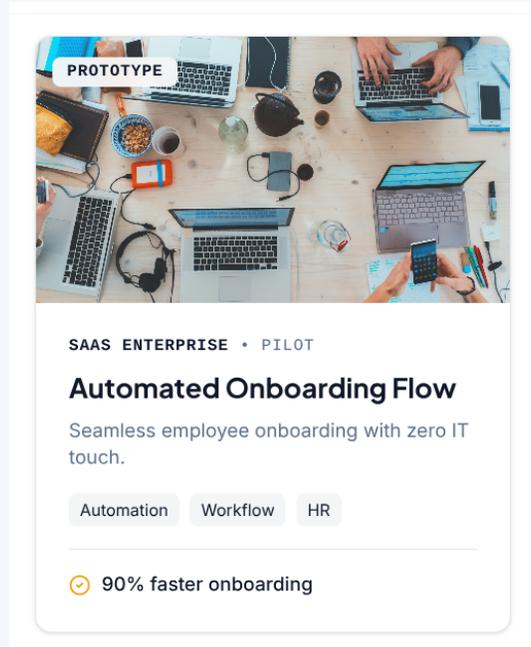


PROTOTYPE



# Automated Onboarding Flow

SaaS Enterprise • Pilot

Seamless employee onboarding with near zero manual IT work. A workflow driven system that connects HR events to identity, apps, and devices with approvals and audit logging.

<b>Engagement</b>	Prototype blueprint and pilot workflow
<b>Primary users</b>	HR, IT operations, security, hiring managers
<b>Best for</b>	Enterprise SaaS teams onboarding at scale
<b>Core outcome</b>	Day one readiness with near zero manual IT work

This case study is presented as a representative Torchline prototype and pilot blueprint. Details are anonymized and results reflect a measured pilot workflow in a controlled scope.

## Executive Summary

Torchline designed an automated onboarding flow for an enterprise SaaS organization to standardize access provisioning, reduce manual handoffs, and improve day one readiness for every new hire. The solution is event driven, role aware, and built with governance in mind so teams can move faster without sacrificing security.

## Client Context

An enterprise SaaS organization with mature identity management and a growing tool stack. The onboarding process spans HR, identity, email, ticketing, collaboration tools, and device provisioning.

## The Challenge

Onboarding required coordination across HR, IT, security, and hiring managers. The process relied on tickets, spreadsheets, and ad hoc messages to provision accounts, assign groups, request licenses, and confirm device readiness. Delays created a poor first week experience, while inconsistent access controls introduced risk.

## Objectives

- Reduce onboarding cycle time from HR submission to ready state
- Eliminate repetitive manual provisioning work for standard roles
- Ensure least privilege access through role templates and approvals
- Provide an audit trail suitable for internal reviews
- Support exceptions without breaking the workflow
- Create a foundation that can extend to offboarding

## Solution Overview

Torchline delivered an event driven onboarding workflow with role templates, approvals, connector based provisioning, and audit logging.

## What the workflow automates

- HR event triggers the workflow and validates required fields
- Role templates calculate access for identity, email, and core tools
- Approvals run only where policy requires them
- Provisioning executes in parallel across systems to minimize wait time
- A status record tracks every action with timestamps and outcomes
- Exceptions route to a review queue with clear remediation steps

## Impact Snapshot

The pilot focused on standard roles with clear templates and the highest volume onboarding paths. Outcomes below reflect that controlled scope.

Metric	Before	After	Pilot outcome
Time to ready state	Two to five business days	Under one business day for standard roles	Ninety percent faster
Manual provisioning steps	Twenty five to forty per hire	Zero to three per hire	Near zero IT touch
Access errors	Frequent missing groups and licenses	Template driven and validated	Fewer first week issues
Audit visibility	Scattered across tickets and chat	Centralized event log	Instant traceability
Manager effort	Multiple follow ups and approvals	Single approval where needed	Less coordination time

### Additional observed benefits

- Ninety percent faster onboarding completion in the pilot workflow
- Near zero IT touch for standard hires with complete audit logging
- Fewer access issues due to consistent role templates and validation
- Improved security posture through approval gates and least privilege defaults
- Clear operational visibility through dashboards and automated notifications

## Architecture

The architecture uses an orchestration layer that listens for HR events and runs a deterministic workflow. Each downstream system is integrated through a connector with idempotent actions, so reruns are safe. All actions write structured audit events to a log store for reporting and troubleshooting.



### Key design decisions

- Deterministic role templates so access is predictable and reviewable
- Connector actions are idempotent so safe reruns do not create duplicates
- Parallel provisioning across systems to reduce wait time
- Central job record to track status, failures, and exception routing
- Structured audit events for every change, approval, and error

## Implementation Approach

The pilot was delivered using a phased rollout that prioritized speed to value while maintaining security controls.

Phase	What happens	Why it matters
Discovery and mapping	Stakeholder interviews, system inventory, policy mapping, role template design.	Aligns automation to real policies and clarifies ownership.
Workflow build	Triggers, validation, approvals, provisioning steps, retries, and audit logging.	Creates a reliable workflow that is safe to rerun and easy to monitor.
Pilot rollout	Limited department launch with daily monitoring and rapid tuning.	Finds edge cases early and builds confidence with measurable results.
Scale and harden	Broader role coverage, dashboards, runbooks, and governance cadence.	Turns a pilot into an operational system that can grow with the org.

## Security and Governance

Automation only works when it is trusted. This workflow was designed to enforce policy, reduce risk, and provide transparency for audits and internal reviews.

- Least privilege role templates with explicit group membership and license grants
- Approval gates for sensitive access such as finance, customer data, and production systems
- Strong validation on HR inputs to prevent misprovisioning
- Audit logging for every action, including who approved and when
- Idempotent provisioning to avoid duplicate accounts and conflicting state
- Environment secret management using platform variables and scoped tokens
- Optional access review hooks for periodic recertification

## Technology

- Workflow orchestration using Workato, Zapier, or a custom Node and Python service
- Identity and access using Okta or Azure Active Directory
- HR source event from an HRIS such as Workday, BambooHR, or Rippling
- Core SaaS provisioning for email, chat, ticketing, documentation, and CRM
- Data store for mappings, job state, and audit logs using Postgres or SQLite
- Notifications via Slack and email with status links for HR and managers

## Pilot Timeline

Week	Scope	Key outputs
One	Discovery	System inventory, role templates draft, exception catalog
Two	Build	Workflow skeleton, core connectors, validation rules
Three	Pilot	Limited department onboarding, monitoring, tuning
Four	Scale	Expanded templates, dashboards, runbook, handoff

## Deliverables

- Role template catalog with owners and approval requirements
- Production ready workflow with monitoring, retries, and safe reruns
- Connector library for identity, email, and prioritized SaaS tools
- Admin dashboard for job status, exceptions, and time to ready state
- Audit log export format suitable for security and compliance reviews
- Runbook and operating model for ongoing updates and new app onboarding

## Next Steps

- Expand role templates across departments and locations
- Add automated offboarding using the same event driven framework
- Introduce license governance to prevent over allocation
- Add access review automation for periodic entitlement validation
- Track onboarding analytics including failure reasons and recovery time

### Interested in implementing this blueprint?

Torchline can tailor the workflow to your identity stack, HRIS, and critical applications, then deliver a pilot that proves outcomes fast.

#### Blueprint components

- HR event ingestion and validation
- Role template library with approval gates
- Provisioning connectors with safe reruns
- Exception queue with guided recovery actions
- Audit log with dashboards and exports

#### Example integrations

- Workday, BambooHR, Rippling
- Okta, Azure Active Directory
- Google Workspace, Microsoft
- Jira, ServiceNow
- Slack, Teams
- Confluence, Notion