

OPEN-SOURCE AI PLAYBOOK · FOR OPS, FINANCE AND HR

New-Hire Onboarding

New hires spend their first weeks waiting for access and asking the same questions.

THE SYSTEM

Sets up accounts, sends the first-week plan and answers new-joiner questions from your handbook.

BUILD TIME

1-2 weeks

HOW IT'S BUILT

Low-code

WORKS WITH

Google Workspace or
Microsoft 365 + Slack
or Teams

OWNER

People Ops or HR lead,
with IT

How it works: from signed offer to day 30, nothing left to memory





Ask the handbook

When's my first payday?

Payroll runs on the last working day of each month. You started on the 3rd, so your first pay is on 31 March, pro-rated. Add your bank details in Gusto by the 20th.

[Handbook · Pay and payroll](#) [Payroll calendar 2026](#)

Is there a budget for a standing desk?

The handbook doesn't cover this, so I've sent your question to Maya in People Ops. She'll reply here.

[Passed to People Ops](#)

Sample answers, fictional company.

Access: the system asks, IT approves

1. Signed offer

Role: Customer Success Manager

2. Role bundle

Google Workspace, Slack, HubSpot, Zendesk. Agreed with IT in advance.

3. Request in the IT queue

One ticket per tool, raised by the system

4. IT approves and sets up

A person in IT checks each request and creates the account

5. Day-1 check

The system confirms each login works and flags gaps to IT

✗ **The system never gets:** admin rights, accounts it creates itself, or the power to approve its own requests.

Can we build it? **FOR YOUR TECH LEAD**



Tools you'll use

Where a new hire starts	BambooHR or HiBob (new-hire trigger)	or Rippling, Workday
Access and laptop requests	Your IT queue, such as Jira Service Management	or Freshservice, ServiceNow
Running the steps	n8n	or Make, Zapier, Power Automate
Messages and check-ins	A Slack app	or a Teams bot, or email
Handbook answers	Claude reading your handbook in Drive or SharePoint	or ChatGPT, Gemini, Copilot



Three ways to build it

Start simple **2-3 days**

A checklist template, scheduled messages in Slack or Teams, and a Claude or ChatGPT project with your handbook for questions.

Production **1-2 weeks**

n8n starts from the signed offer: raises the IT requests, sends the plan and intros on schedule and answers questions in chat.

Custom **3-4 weeks**

Adds a plan per role, day-1 account checks and a view of every new hire's progress for People Ops.



Access it needs

- ◆ Read access to new-hire records in the HR system
- ◆ Permission to create tickets in the IT queue, never to change accounts
- ◆ Read access to the handbook folder only



Guardrails

- ◆ Access is requested through your IT process and approved by IT; it never grants admin rights
- ◆ It never creates or changes accounts itself
- ◆ Handbook answers show the source and pass anything not covered to a person
- ◆ Managers hold the welcome and the 30-day talk; the system only schedules them



What to measure

- ◆ New hires with a working laptop and accounts on day 1
- ◆ Questions the bot answered, and how many it passed on
- ◆ Days to a first real piece of work
- ◆ 30-day check-in scores



Who builds and runs it

A People Ops lead who owns the plans and the handbook, an IT contact to agree role bundles and the request process, and someone comfortable with n8n for the first one to two weeks. After that, People Ops keeps plans current and managers own the human moments.

◆ **FREE, OPEN SOURCE, NO SIGN-UP**

20 AI systems every company should *build first.*

This playbook is one of 20. Each one solves a problem almost every company has, and shows how the system works, the tools it runs on, how long it takes to build and where a person signs off. Read them all, download any of them, and send them to your team.

[See all 20 playbooks →](#)

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FOR EVERY TEAM

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FOR OPS, FINANCE AND HR

16 Sales-to-Delivery Handoff
17 Invoice & Collections Chaser
18 Candidate Shortlist System
19 Contract Risk Review
20 New-Hire Onboarding

WANT HELP BUILDING IT?

We'll build your first AI systems with your team.

In a free 30-minute call with our founder, we'll look at your tools and your week, and pick the playbooks that would save you the most time first.



Pallav Kaushish

Co-Founder, AIXGrowth

Free 30-minute call · No commitment

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