BRIGHT IDEAS

Optimizing Staff Onboarding

Erika Hatva

When Henry Quiñones joined the University of Vermont’s Technical Services Program—now called the Technical Services Partnership (TSP)—as a biomedical equipment technician (BMET) in October 2004, he remembers sitting in front of the computer for two days learning about company policy, and then being told to go out and work at client sites. T.C. Bugbee had a similar experience in May 2000. “I remember thinking: What am I supposed to be doing here? Each [client] site has a slightly different contract, and I didn’t know what each contract was,” Bugbee recalls.

Today, new hires have a completely different experience, as Mark Robinson, BMET II; and Chris Olden, BMET I, who both joined the TSP in early September, can attest. According to Robinson, “the process is very professional and involved. When they do release me to work with hospital clients, I will be very prepared.”

Olden agrees. “They do a good job of training us on various types of equipment, and we get great tips from specialists.”

The transformation from what Mike Lane, TSP’s associate director, calls a “give-and-go strategy,” in which new hires were given as much information as possible in the shortest period and had to go apply it, to an improved staff onboarding system, did not happen overnight. The team incorporated feedback from new hires, staff, and clients over a period of five or six years, adding several key elements.

**Challenge**

The staff of the TSP, a non-profit division within the University of Vermont, consists of 40 clinical engineers (CEs) and BMETs, and 12 support staff who provide medical technology planning and management services to more than 30 hospitals and more than 300 independent clinical care facilities throughout Vermont, New Hampshire, and New York.

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The TSP’s Performance Excellence Journey, part of a long-term strategic planning process, consists of several teams, including the employee engagement team with Gail Burrows, business manager and team leader; Andy Koval, BMET II; Rich Wagner, BMET III; Jamie Dubois, BMET III; Henry Quiñones, BMET II; and Doug Gomez, scientific instrument maker.

The team focuses on how to engage and hire the best staff, and oversees onboarding or orientation, exit surveys, and recognition. According to
Lane, onboarding in particular is key to ensuring a long-serving, productive employee. “We are not a large organization. In the early 90s, we started seeing an increase in the demand by our customers for faster services, and simultaneously an increased growth in the use of technology. As our support model changed to deliver faster service to the customers, we had a dramatic increase in hiring” says Lane.

With more hiring, some issues came to light. “We have a lot of long-term TSP staff members,” says Burrows. “Average employment is 14.8 years. However, some staff members stayed less than a year.” In interviewing previous hires, the team discovered what worked in the process, and what did not.

“On the whole, new staff did not feel welcomed. Bugbee was one of those interviewed. “I compared what my experience was when I was brought on board, and what I would want others to experience,” she says. “The key was communication.” Professional development of staff, particularly in technical skills, was lacking, but the biggest issues seen were with poor customer interaction.

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“The University of Vermont Technical Services Partnership Staff

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”We found that new staff did not understand TSP’s philosophy or feel that they were part of the team,” says Lane. “Our initial orientation process was long on information and short on evaluation. A process to incorporate feedback from the new staff members was nonexistent.”

On the basis of the interviews, the employee engagement team concluded that the onboarding process was:

- Too short: two days on the computerized maintenance management system (CMMS), customer service, policy reading, and other information.
- A daunting memory dump of information on new staff, with limited practical application.
- Limited in scope: For example, minimal orientation to the philosophy of the organization.
- Short on feedback.
- Not welcoming to a new staff member.

Solution

How were these challenges addressed? “What we do is not static,” says Lane. “The goals were to improve the welcoming experience, ensure an excellent new employee knowledge base in both theoretical and practical knowledge, and always improve the process. Ensuring longevity of staff and their knowledge is critical to long-term customer relationships.”

The process went through several incarnations, known to the team as Revision (Rev) 1, Rev 2, and the most recent, Rev 3, which has been in place for just a few weeks:

Rev 1 “Give-and-go” strategy focused on computer work, with little practical training.

Rev 2 Based on feedback, new staff visited client sites for entire days.

Rev 3 A new structure includes feedback, onboard agents, a checklist and daily schedule, online training modules, ongoing assessments, and real-time mentoring.
Key elements of the new process include:

Incorporating Feedback

In Rev 1, Lane says, “there was no immediate feedback.” As staff feedback was integral in improving the process, adds Burrows, onboarding practices evolved “whenever there were new hires. For example, one year we could have three new staff, and the next year we could have five or six.”

Currently, routine feedback from the new staff member is incorporated on a daily basis. Formalizing feedback from former hires, new staff, clients, and supervisory staff who meet regularly with account executives is “something that will be in place soon” says Burrows.

Onboard Agents and Mentors

Rev 3 includes an agent and a mentor (two different individuals) for each new hire. An established onboard agent from the TSP team works with the new hire to:

1. Discuss the theme and training plan for the day, including morning education modules, afternoon in the field, as well as individual mentoring and practical equipment training
2. Check in using assessment from the previous day
3. Discuss knowledge gained
4. Hold a question and answer session

New employees are also immediately linked to a mentor (a peer staff member), who welcomes the new hire, helps him or her put material learned online into action, and clarifies daily processes.

A Checklist

A detailed checklist is used to find gaps in the process, and includes, for example, hire completion, administration setup, and welcome. The checklist ensures that each employee goes through the same process.

A Theme-Based Schedule

The onboarding process has most recently been divided into technical and practical training, with Quiñones and Bugbee focusing on technical aspects, and other mentors focusing on practical aspects.

A schedule such as the one shown in Figure 1 clarifies each day’s activities for the new hire.

Training Modules

“We have created an online orientation
program that aligns with the values of the organization,” says Lane. The employee engagement team ensures that new staff are given up-front education on the organization and the key challenges that are faced.

Multimedia tools are selected from a range of vendors. They include training in customer service, the Health Insurance Portability and Accountability Act of 1996 (HIPAA), etiquette, and safety. Videos are also worked in, covering, for example, blood-borne pathogens. In addition, “respect” modules focus on building respect for the customer, team, environment, and oneself.

“Staff is our most important resource,” says Tobey Clark, director of the Instrumentation and Technical Services Department at UVM. “Orientation is a key phase in developing engaged employees. The most recent new hires are taking the UVM online course Healthcare Technology Management to better live our mission and understand the ‘big picture.’”

Mentors reinforce and expand on what is taught in modules. In particular, says Quiñones, “customer service is key. It is not easy to teach. For example, Mark Robinson and Chris Olden are learning about customer service in modules, which provides baseline knowledge. I will speak to a customer on one call, and let them talk to a customer on another call, and be able to provide immediate constructive criticism.”

“Time management is also key,” says Bugbee. “There are so many people and priorities, and

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What advice does the team have for other healthcare technology management departments wishing to improve their new staff orientation process? “I have one word,” says Burrows. “Listen.”

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Results
The Rev 3 process is proving to be successful in its early stages, delivering:
1. Consistent information, even post orientation, that is available to staff at all times
2. Better educated and more productive staff, earlier in their arrival to the organization
3. A higher level of knowledge retention
4. A more welcoming process

“The work of our employee engagement team has resulted in an outstanding orientation process to jump start new staff with the knowledge, motivation, values and a path to be part of our team” says Clark. New hire Robinson agrees, saying he feels he is “a member of the team” and knows what is expected of him. He applauds the fact that the department “always wants feedback, and is always looking for ways to improve.”

There are plans afoot to increase evaluation of the orientation checklist to ensure all components are covered, and to include a 60-, 90-, and 120-day check in for knowledge retention and application in the field. Clark notes that continuous assessments of opportunities for improvement “have made this a constantly advancing program.”

The same format for leadership assessment and development is used with additional criteria from the Vermont Business Center’s Leadership and Management series.

What advice does the team have for other healthcare technology management departments wishing to improve their new staff orientation process? “I have one word,” says Burrows. “Listen.”

“Find out why you have low retention,” she urges. “Our people are the face of the organization. If they are successful in the field, then customers are happy, and that can increase demand. Managers may think they know what to do, but staff come up with great ideas!”