



# ODP LIFECYCLE (ENTRANCE) SOLUTIONS STARTER®

---

This Solutions Starter provides strategic and tactical ideas to consider when starting an improvement project. The Starter is organized by the standard survey sections and questions of the On-Demand Pulse (ODP) Lifecycle Entrance Survey. Section definitions were developed in consultation with Press Ganey research scientists. The suggestions are based on literature reviews of industry best practices, top-performer experience, and practical fieldwork.

Solutions Starters support your ability to build an organizational culture and purpose-driven workforce to achieve exceptional patient-centered care. Improvement requires selecting tactics that are aligned with goals and implementing them consistently across your organization. For assistance, please contact your Press Ganey representative or partner with [Press Ganey Strategic Consulting](#) to design and implement a tailored action plan.

Join the [Press Ganey Community](#) to share best practices and network with peers.

## CONTENTS

<b>Job Expectations</b> .....	<b>4</b>
Section Definition .....	5
Voice of the Workforce .....	5
Section Items .....	5
Improvements.....	5
<b>Hiring Process</b> .....	<b>7</b>
Section Definition .....	8
Voice of the Workforce .....	8
Section Items .....	8
Improvements.....	8
<b>Department Interview</b> .....	<b>9</b>
Section Definition .....	10
Voice of the Workforce .....	10
Section Items .....	10
Improvements.....	10
<b>Pre-Employment Screening</b> .....	<b>11</b>
Section Definition .....	12
Voice of the Workforce .....	12
Section Items .....	12
Improvements.....	12
<b>Appendix: Supporting Tactics</b> .....	<b>13</b>
Data Use and Learning .....	14
Comment Analytics .....	14
Learning Collaboratives.....	15
Strategic Engagement Assessments .....	16
Continuous Listening .....	19
Process Improvement.....	21
Continuous Process Improvement .....	21
Sustainability .....	23
Change Readiness.....	23
Leader Skill Development .....	24
Rewards and Recognition Programs .....	26

Standards of Behavior ..... 27

Talent Strategy..... 29

## **JOB EXPECTATIONS**

## JOB EXPECTATIONS

### SECTION DEFINITION

The survey items in this section measure an employee's perception of how well the organization set expectations for the new job. This includes how well-informed they feel about their work and work environment, their role and responsibilities, and what it will be like to work with their new manager and team.

### VOICE OF THE WORKFORCE

- “I appreciate it when my manager has shared the job expectations with me. I am even more grateful when they tell me how and when I've met or exceeded those expectations.”
- “I was somewhat alarmed at the fact that my boss didn't set clear expectations for my role. There are a lot of gray areas in the work that we perform. I often hesitate and ask multiple questions to ensure that I'm not stepping out of line. It's frustrating.”

### SECTION ITEMS

- I believe I have a realistic expectation of the work I will be doing.
- I feel well informed of my role and job responsibilities.
- I have a good sense of what my work environment will be like.
- I have a good sense of what working for my new manager will be like.
- I have a good sense of what working with my new team will be like.

### IMPROVEMENTS

- Set SMART (Specific, Measurable, Achievable, Relevant, Time-Bound) goals with your new hire. Be collaborative to ensure goal achievement.
- Be clear when setting goals.
- Set and communicate clear expectations of your new hire's role.
- Have an open-door policy for all questions.
- Schedule weekly 1:1 progress meetings for the first month, then transition to monthly meetings.
- To ensure direct reports' accountability, set goals and outline expectations (e.g., deliverables, due dates) for each employee before assigning any project/task.
- Extend a warm welcome. Give a first-day tour (e.g., supply area, restrooms, break room, etc.), introduce your new hire to other staff members, and encourage questions along the way.
- Provide background materials to help familiarize your new hire with their work environment.
- Schedule and describe the onboarding process to your new hire before their first day.
- Ease your new hire's jitters. Provide them with information on administrative policies and procedures in advance (e.g., dress code, directions, parking, who to ask for upon arrival, etc.).

- Schedule a meeting with your new hire to get acquainted. Share information about your management style and explain future expectations. Review what the ramp-up process will be like in the first couple months.
- Conduct an orientation session for your new hire to explain benefits, insurance, organization's history, as well as a high-level view of the organization's culture, mission and vision.
- Review your management style and ask your new hire what management styles resonate successfully with them.
- Schedule an informal gathering (such as lunch) to allow your new hire to meet the team.
- Encourage team members to share what their experience is like working in the organization as well as on the team.
- One of the best ways to train your new hire is to have them shadow other workers, both inside and outside of their department. Having your new hire shadow employees in other departments that interact with your own department will give them a much better understanding of how your organization works.
- Discuss with your new hire how goals and performance will be measured and how rewards/consequences will track to the individual's performance.
- **VIDEO:** [Set Specific Behavioral Standards](#)
- **VIDEO:** [Share the Why](#)

## **HIRING PROCESS**

## HIRING PROCESS

### SECTION DEFINITION

The survey items in this section measure an employee's ratings of the quality of key components of the hiring process. This includes such factors as the ease of the application process, professionalism and timeliness of the HR staff, and the efficiency of the hiring process.

### VOICE OF THE WORKFORCE

- “The HR representative made me feel comfortable and reduced my anxiety about the next steps in the interview process. If I had questions, the HR representative and hiring manager addressed them for me quickly. This experience confirmed that I had picked a fantastic organization to work for!”
- “The application process was a nightmare! The site repeatedly timed out. I nearly quit looking at this company altogether.”

### SECTION ITEMS

- Ease of completing application/forms.
- Initial contact with HR staff (e.g., person, phone).
- Professionalism of HR office staff.
- Prescreening process explained by recruiter.
- Timeliness of follow-up after interview process.
- Timeliness of employment offer after interviews.
- Frequency of updates on the stage of the hiring process.
- Efficiency of the hiring process.
- Explanation of the hiring process.
- Review of orientation schedule.
- Overall rating of the new hire process.

### IMPROVEMENTS

- Provide regular status updates to the candidate and fully communicate next steps.
- Develop a checklist of the recruiting process with actions the candidate and the organization must complete; include timing.
- Review the recruiting process checklist at the end of the first interview, ensuring the candidate understands the timeline may be shorter or longer as dictated by business needs.
- Provide regular status updates to the candidate and fully communicate next steps.



## DEPARTMENT INTERVIEW

## DEPARTMENT INTERVIEW

### SECTION DEFINITION

The survey items in this section measure an employee's ratings of the quality of information gained from the departmental interview process. This includes information such as job responsibilities, departmental operations, schedule/shift, and the post-offer timeline.

### VOICE OF THE WORKFORCE

- “The departmental interview process was refreshing! The team has clear short-term and long-term plans. They knew the type of team member they were looking for. I felt like I belonged with this team.”
- “There were warning signs during the departmental review. One team member was playing with his phone during the entire interview. When I asked questions about the team dynamic, there was obvious hesitation to answer the question. I could tell that someone on the interview panel did not mesh well with the rest of the team.”

### SECTION ITEMS

- Communication of job responsibilities.
- Review of departmental operations.
- Discussion of schedule/shift.
- Timeline of manager follow-up (post-offer).
- Overall rating of departmental interview process.

### IMPROVEMENTS

- Give each employee the most up-to-date version of their job description in writing, unless your organization has an objection to doing so (check with your supervisor and/or Human Resources representative). If a job description does not exist, create one.
- Train employees in legal and effective interviewing. If your organization uses a formal process, make sure the employee is familiar with it and understands what's expected of them.
- Conduct peer interviews by selecting a few employees who will interview potential candidates. Remember, candidates are evaluating your organization during the hiring process. Therefore, employees conducting peer interviews should be genuinely happy, positive, engaged, and enthusiastic about your organization.
- Provide interview training to peer interviewers and develop an interview guide for them to use.
  - An interview guide ensures each candidate is treated equally and fairly by asking the same assessment questions.
  - Set a time limit for each interview. Ideally, you want to set aside 30 to 60 minutes.

## **PRE-EMPLOYMENT SCREENING**

## PRE-EMPLOYMENT SCREENING

### SECTION DEFINITION

The survey items in this section measure an employee's ratings of key components of the pre-employment health/drug screening process. This includes such factors as the professionalism and efficiency of the health and drug screening process, the wait time involved, and the explanations provided for any process delays.

### VOICE OF THE WORKFORCE

- “The screening steps were well explained, and the reasons for the steps were professionally illustrated to help me understand why certain screenings were required.”
- “The wait time in the lab for my drug test was ridiculous.”

### SECTION ITEMS

- Wait time in lab for UDS (urine drug screen).
- Professionalism and efficiency of drug screening process.
- Professionalism and efficiency of health screening process.
- Length of time to clear health screening (obtain green slip).
- Explanation of process delays (if applicable).
- Overall rating of health and drug screening process.

### IMPROVEMENTS

- Train screening collectors to follow standardized processes to provide a seamless experience for the individual.
- Collectors should walk individuals through the entire screening experience so that they will have reasonable expectations of what will take place.
- Most individuals may expect some wait time when they arrive for testing, but they also expect that staff will demonstrate courtesy and respect by communicating about any delays.
- After a long wait, it is important that screening staff acknowledge the wait with something short, simple, and authentic (e.g., “We respect your time, and we’re sorry we kept you waiting.”).

## **APPENDIX: SUPPORTING TACTICS**

## DATA USE AND LEARNING

### Comment Analytics

---

Comment analytics leverages Natural Language Processing to assess and review open-ended survey items. The technology will group similar themes and concepts together to provide leaders with an overall frequency report to better assess workforce engagement and important elements of culture.

**Use comment analytics to gain a deeper understanding of employee perceptions and observations of culture, teamwork, and care delivery.**

- Comment analytics:
  - Quantifies and analyzes qualitative data for action.
  - Enables identification of emerging trends and root causes.
  - Uses sentiment analysis to represent the emotional tone in the comment text.
- Thematic and visual organization of comment responses and sentiments enable deep dives into certain themes and concepts.
- For example, a leader can isolate and display comments related to decompression or activation and then discern positive from negative sentiments to uncover inconsistencies in perspectives and opinion.
- Quantitative analysis of qualitative data provides information on:
  - **Topics:** What is being said?
  - **Volume:** Topic frequency
  - **Sentiment Volume:** Is the comment positive or negative?
  - **Sentiment Strength:** How positive or negative is the comment?

## Learning Collaboratives

---

Learning Collaboratives expand on the concept of cross-functional improvement teams. The educational process engages health care professionals to learn about successful practices from each other within the same organization or in broad collaboration with other organizations and services within the community.

Learning Collaboratives engage the people doing the work in process and quality improvement. Adult learners can be energized by learning from those like them and contributing to institutional knowledge.

Identifying and promoting internal best practices is the most efficient approach to system-wide improvement. Sustainable employee engagement success is dependent on local continuous improvement organized around the specific needs of employees. Learning Collaboratives provide an opportunity for managers and leaders throughout a health care system to learn from each other, and to spread employee engagement best practices system wide.

### **Create a forum for sharing lessons learned from successful and unsuccessful efforts.**

- Schedule time for formal, routine collaboration across departments and locations.
- Engage cross-functional improvement teams from across the enterprise. To be truly cross-functional, there must be representation from managers and leaders across the organization.

### **Use a system improvement model to standardize language and accelerate adoption.**

- Obtain executive leadership buy-in.
- Identify management champions.
- Define the purpose, goals, roles, and responsibilities.
- Routinely discuss the collaborative's efforts at standing meetings.
- Embrace high-reliability principles and commit to continuous process improvement.

### **Include participation in Learning Collaboratives in job descriptions.**

- Provide incentives for participation.
- Recognize managers for contributing knowledge gains – both through success and failure.

### **Codify innovation into a replicable improvement approach.**

- Document improvement efforts and processes from the identification of an improvement need through follow-up and monitoring.
- Draft procedures to capture and reapply successful process improvement efforts.
- Recognize and reward innovation and the adoption of evidence-based strategies.

## Strategic Engagement Assessments

---

Routine assessment of employee engagement, nursing excellence, physician engagement and alignment, resilience, diversity, well-being, and safety culture provide a straightforward and consistent process for interpreting data, identifying strengths and concerns, setting priorities for improvement, and measuring progress.

**Note:** Many of these engagement survey initiatives (i.e., nursing excellence, resilience, and safety culture) can be streamlined into one single survey administration to avoid survey fatigue and increase response rates.

### Assess employee engagement.

- An engaged workforce drives sustainable excellence. Individuals who feel connected to the mission and vision of the organization, supported by their managers, and appreciated by their colleagues tend to be more engaged than those who lack such attachments.
- Because every element of the care experience is delivered to the patient through the workforce, investing in building an engaged, high-performing workforce is crucial to the delivery of high-caliber care and facilitates optimizing other key performance metrics across experience, quality, and finance.
- Engagement data identifies targets for investment and improvement that resonate across patient experience, workforce, safety, operational, and clinical outcomes.
- Ensuring employees' needs are met is foundational to establishing a culture of engagement.
- It is important to have a clear understanding of key drivers that impact employees' work environment (e.g., relationships with managers, access to tools and resources, and opportunities for personal development).
- Use a comprehensive, continuous approach to collecting and acting upon employee culture and engagement data. The measurement tool should have a firm theoretical and empirical basis.
- Results of any employee engagement analysis should capture:
  - An outcome-based engagement metric
  - A work-unit segmentation metric identifying which units need the most intervention
  - A management metric that identifies which managers need assistance or coaching in order to effectively drive improvement for their teams

### Assess nursing excellence.

- Nurse retention is top of mind as organizations seek to maintain institutional knowledge, ensure consistency in care delivery, and promote patient experience and loyalty.
- Nurse disengagement can be costly for an organization because of its impact on nursing turnover, patient safety, and patient experience.



- Including nursing-specific measures on the employee engagement survey can help organizations drive nurse engagement, improve performance, and facilitate the Magnet Recognition Program® application process.
- Insights gathered from the segmentation of RN scores can have implications not just for nurse engagement and retention, but also for interventions to drive safety, patient experience, and reputation.

### **Assess physician engagement and alignment.**

- Strong physician engagement and alignment can lead to better patient experiences and quality of patient care. Conversely, when physicians leave, become disengaged, or are not aligned with the organization's mission, vision, and values, the impact can be felt throughout the care delivery process.
  - Engagement measures physicians' appraisal of their work environment, emotional experiences, and attachment to the workplace.
    - A highly engaged physician may be content with day-to-day, patient-facing activities, but resisting organizational change and preventing his department from attaining key goals. This describes an engaged physician who is not aligned with his organization.
  - Alignment measures the extent to which a physician feels a strong partnership or connection with the organization's leadership.
- By measuring both engagement and alignment, organizations gain insight into if your physicians are likely to stay, as well as if they will support your strategic initiatives. Organizations that meaningfully engage and collaborate with physicians and physician leadership are on the most direct path to deliver exceptional patient experiences and outcomes.

### **Assess resilience.**

- Resilience metrics can act as an early warning sign for teams that are at risk of burnout.
- Resilience scores assist organizations in determining which groups may need support both at and away from work.
- Resilience is comprised of two major components: activation and decompression.
  - Activation is centered on the ability to connect one's work with meaning and a sense of purpose, and the ability to treat patients as individuals.
  - Decompression is centered on the ability to disconnect—to free one's mind from work stresses and enjoy personal time.
- To minimize burnout and build caregiver resilience, identify sources of avoidable stress and distress by ensuring the workforce has the resources and support needed to deliver the safest, highest quality care.

### **Assess diversity.**

- As health care leaders strive to improve employee engagement, many organizations are expanding their efforts to foster diverse and inclusive work environments.

- Each organization is different; there are variations regarding which employees may face marginalization in the workforce and how this would manifest.
- Conducting an overall assessment of diversity-based issues gives a general understanding of how much of an impact an employee's background has on their daily work lives.
- It is important to understand diversity-related organization, manager, and employee dynamics such as:
  - This organization values employees from different backgrounds
  - This organization demonstrates a commitment to workplace diversity
  - All employees have an equal opportunity for promotion regardless of their background
  - My coworkers value individuals with different backgrounds
  - The person I report to treats all employees equally regardless of their background
  - Administration of diversity-based measures over time can identify emerging patterns of marginalization that may warrant action.

**Assess well-being.**

- Many organizations have started to focus on assessing employee and provider health and wellness from the more holistic standpoint of overall well-being.
- At a high level, this overarching concept of well-being includes multiple facets of an individual's life: emotional and physical health, social support and personal connections, financial security, and occupational fulfillment.
- Individuals who rate high on well-being are thought to be more engaged in their work, demonstrate more commitment to organizations that support them, are more resistant to burnout, and have the personal tools necessary to cope with being involved in medical errors, adverse events, or other traumatic experiences that personally impact members of the healthcare industry.
- Individual-level well-being measures can be used to gauge the impact of other workplace dynamics, such as organizational culture, leadership changes, external events, etc., on high-level measures of the overall quality of life of employees. Taken together, these components reflect a state of being that is beyond both engagement and traditional approaches of employee wellness.

**Assess safety culture.**

- Organizations are best positioned to develop a high-performing workforce when they build a culture of safety and adopt safe processes.
- To align the organization around a mission to achieve Zero Harm, one of the first steps is to assess care provider feedback, attitudes, and perceptions related to patient safety.
- Direct feedback from those responsible for delivering care informs the level of organizational focus needed to make safety a top priority across the organization.
- Assessing safety culture at the organization and work unit levels supports awareness around patient safety issues, identifies strengths and concerns, and evaluates the impact of patient safety interventions and performance over time.

## Continuous Listening

---

In this challenging environment, the risk of caregiver burnout and turnover continues to threaten morale, retention, and profitability. Giving a voice to caregivers through purposeful and continuous listening empowers people leaders to mitigate these risks in real time, demonstrates respect for the workforce, and creates an environment of trust. Monitor workforce trends using culture and engagement surveys, stay and exit interviews, lifecycle and pulse surveys. Use the information to identify areas to target improvement efforts.

### **Conduct annual safety culture and engagement surveys.**

- Have senior leaders promote participation and explain why the surveys are conducted and how the results will be used.
- Use the results to inform engagement and culture improvement strategies based on workforce readiness for change, leadership development opportunities, and coaching and readiness planning for leaders and teams with low engagement.
- Include measures of burnout and address resilience if results indicate high risk.
- Be transparent about results. Share the findings with all providers and employees.

### **Conduct Stay Interviews.**

- Stay Interviews are structured, one-on-one discussions led by a manager or other leader to learn ways to strengthen an employee's engagement and retention and to build trust.
- These should be held separately from annual reviews with a sole focus on what leadership can do for the employee or provider.
- There are several key questions for conducting a Stay Interview. Each question has additional probing questions to get the most out of the employee's feedback.
  1. What do you look forward to about your work?
    - Give me an example.
    - Tell me more about...
    - Who do you look forward to working with the most?
  2. What are you learning here, and what do you want to learn?
    - Which other jobs here look attractive to you?
    - What skills do you think are required for those jobs?
    - What skills would you have to build to attain your goals?
  3. Why do you stay here?
    - Tell me more about why that is so important to you.
    - Is that the only reason you stay, or are there others?
    - If you narrowed your reasons to stay to just one, what would it be?
  4. When was the last time you thought about leaving us, and what prompted it?
    - Tell me more about how that happened. Who said what?
    - What's the single best thing I can do to make that better for you?
    - How important is that to you now on a 1-10 scale?

5. What can I do to make your job better for you?
  - Do I tell you when you do something well?
  - Do I say and do things to help you do your job better?
  - What are three ways I can be a better manager for you?

**Conduct Exit Interviews.**

- Although Exit Interviews do not improve the retention of that employee, they inform opportunities to improve, including improvements in how engaged and valued employees feel.
- Explain that the purpose of the interview is to help the organization improve its processes and retain its valuable employees.
- Encourage employees to share the reasons why they are leaving. There are controllable reasons employers can address with improvement initiatives: insufficient training, no opportunity for advancement, feeling underappreciated, unfair treatment, or inappropriate distribution of tasks.
- Ask how the organization could be a better place to work.

**Conduct Lifecycle Surveys.**

- **Entrance surveys** provide a review of the job selection and hiring processes. Ideally, these surveys are administered within the first seven days of employment.
- **Onboarding surveys** provide data about how the experience of new employees changes over time. Research shows proper onboarding leads to more motivated and effective employees.
- **Exit surveys** focus on obtaining specific information about why individuals are leaving the organization. Ideally, data are used in tandem with qualitative information gathered via live and dynamic exit interviews.

**Conduct Pulse Surveys.**

- Complement in-depth culture assessments with real-time continuous measurement to understand the unique stressors that impact nurses, physicians, and employees. Doing so provides insights for building an engaged, resilient workforce.
- Ideal for gauging progress to goal on a defined action area.
- Target a smaller subset of units or a specific demographic group rather than surveying the entire organization.
- Create shorter surveys focused on a specific topic of interest.
- Gain a deeper understanding of key factors emerging from an annual culture assessment.

## PROCESS IMPROVEMENT

### Continuous Process Improvement

---

Continuous Process Improvement (CPI) is the ongoing effort to improve services by increasing the quality of those services or by reducing unnecessary or redundant steps. It supports both patient-centricity and employee engagement.

- It reflects a high level of interest in meeting patient needs and for providing a work environment that improves the delivery of compassionate, patient-centric care.
- Employees who experience the inherent rewards of directly or indirectly reducing patient suffering can take pride that their work is meaningful.

CPI is the core principle behind every structured improvement model, such as the commonly recognized Lean, Six Sigma, Kaizen, and Robust Process Improvement models. It involves the adoption of a structured process for ongoing assessment and improvement.

Care delivery is incredibly dynamic. Science, technology, equipment, personnel, and patient needs are constantly changing. Even organizations with high levels of performance across all metrics can only be sure of performance excellence through ongoing monitoring—a key component for continuous improvement. In fact, to become a high-reliability organization, you must develop a preoccupation with failure and conduct routine and ongoing self-assessment.

Everyone has room for improvement. Engaging in CPI indicates there is a formal program for routine self-assessment, and there are dedicated resources to identify areas of under-performance and to implement improvement plans. CPI processes allow an organization to identify low quality or care problems before safety events or harm can occur.

#### **Adopt a formal, proven method for continuous improvement, such as (in alphabetical order):**

- Kaizen
- Lean
- Robust Process Improvement
- Six Sigma

#### **Implement continuous improvement across all locations in a system.**

- This supports the Learning Collaborative approach for standardizing best practices.

#### **Include all stages of a continuous improvement approach.**

- Collect data to assess the quality of the patient experience and workforce experience.
- **VIDEO:** [Elements of a Data Strategy](#)
- **VIDEO:** [Selecting a Key Performance Indicator](#)
- **VIDEO:** [Identify Barriers to Success](#)

**Include metrics reflecting the mission and values statements in a balanced scorecard for routine executive review.**

- **VIDEO:** [Set the Right Goals](#)
- An improvement strategy is part of a broader data strategy and must align with organizational goals.
- Select a key performance indicator (KPI) that reflects organizational goals for the workforce experience.
- Set goals that directly improve the KPI.
- Set goals based on their unique performance.
- Identify key drivers and leading indicators reflecting the process or behavioral changes being targeted, and track performance on those indicators with routine board-level reviews.
- Routinely review data trends with executive leaders and board members.

**Identify areas of low or poor performance.**

- Conduct root cause analyses to identify the underlying process or human factors.
- Focus your efforts on two or three priority initiatives.
- **VIDEO:** [Focus Your Efforts](#)

**Adopt a High Reliability operating system.**

- Focus on the process failures and aim to build processes that overcome the tendency for human error.
- Employ cross-functional improvement teams with representation from physicians, other practitioners, nurses, reception, billing, technicians, human resources, and other staff.
- Define action plans with roles, responsibilities, and deadlines.
- Identify outcome measures for continuous tracking to assess the success and sustainability of the improvement plan.

**Address obstacles and standardize best practices across the enterprise.**

- Take a closer look at the obstacles impeding improvement and identify ways to eradicate or get around them.
- CPI is part of an overall data strategy. In addition to identifying and improving on areas of underperformance, it informs the identification of existing best practices.
- Standardize the adoption of best practices within a facility and system wide.

## SUSTAINABILITY

### Change Readiness

---

Improvement planning is often the first step in the process of driving change. It includes reviewing engagement data, selecting specific metrics of focus, setting achievement goals, and implementing strategies for reaching those goals and improving performance on the chosen metrics. Assessing change readiness improves understanding of the organizational context driving readiness for change.

#### **Address change readiness issues.**

- Ask questions such as:
  - Are senior leaders prepared to invest their time and energy in this effort on an ongoing basis?
  - Is the broader management team capable of understanding the value of improving culture, and do they have the associated skill set to execute and sustain cultural initiatives?
  - Are dedicated resources available to manage change, either within the organization or through external consultants?
  - What is the past experience of the organization with implementing large-scale change, and how may those previous experiences impact this initiative?
  - Is there a communications group charged with a communication strategy around change?
  - What listening methods does the organization have (e.g., leadership rounds, town halls)? How is feedback obtained from the front lines?
  - How is change assessed at the organization? What does success look like, and how is it measured?
  - Who is responsible for sustaining change?

## Leader Skill Development

---

Managers are the organizational leaders responsible for empowering their employees, coaching for success, setting clear goals, recognizing achievements, communicating with transparency, listening carefully, providing constructive feedback, and helping employees to feel valued. They are essential to the health of the culture and the success of the organization.

It is important to properly enable these leaders to understand their team's culture/current functioning and their role in creating/reinforcing that culture. It is also essential to provide them with the necessary education and coaching to improve their skills and shape a culture that supports their goals.

### **Support managers in developing effective management skills.**

- Many new managers are promoted based upon technical expertise, but this alone will not enable their success in this new and different role.
- Is the broader management team capable of understanding the value of improving culture, and do they have the associated skill set to execute and sustain cultural initiatives?
- It is critical that new managers are educated and supported with new manager training on basic skills (e.g., delegation, communication, teamwork, coaching, meeting management).
- In addition to targeted 1:1 coaching, cohorts of managers may be identified for training on specific management skills or leadership competencies. These groups can be monitored for progress that can be attributed, at least in part, to the training investment.

### **Prepare managers for success with a defined set of competencies.**

- Consider the following questions:
  - How do you prepare your future leaders (and new leaders) for success?
  - Do you have a defined set of essential leader skills and competencies that leaders are trained on and coached to?
  - Are you proactive in supporting new leaders, or do they only get support when they start failing?
  - Do you see signs of burnout among new leaders (high activation/low decompression)?
  - Is your leadership team consistent in their level of competency in key leader skills that are essential to the business?

### **Establish Leadership Development Institutes.**

- Best practice organizations regularly bring their leaders together for group learning and networking in sessions, commonly known as Leader Development Institutes (LDIs).
- LDI sessions provide leaders with the opportunity to:
  - Hear a unified message from their executive leadership.
  - Receive ongoing leadership skill refinement in areas like leading change, coaching skills, and emotional intelligence, etc.



- Learn from one another's challenges and successes. This strengthens the collective knowledge base and increases the cohesiveness of the leadership team.

## Rewards and Recognition Programs

---

Rewards and recognition programs are structured systems that provide incentives to employees to meet or exceed behavioral standards. Rewards are typically monetary in nature, whereas recognition generally provides a psychological or emotional lift. They are often combined into one program, but the two components meet different needs and are addressed in different ways.

Caregivers experience a steady stream of stressors and rewards. When stress compounds unmitigated, it takes a toll on wellness, leaving them emotionally exhausted and struggling to find a sense of meaning and accomplishment. This leads to burnout, which is highly prevalent among caregivers and poses a significant threat to safe, high-quality patient care. Rewards and recognition programs help ensure the stressors are balanced with a sense of value and purpose.

Rewards and recognition programs are crucial for strong safety cultures and a highly engaged workforce. Amplifying the rewards of the work and creating opportunities for interaction through celebration can improve collegiality and enhance resilience.

Rewards and recognition programs should be developed and managed by a cross-functional team comprised of nurses, physicians, nonclinical operational leaders, human resources, organizational development personnel, and marketing and communications professionals.

### **Align rewards and recognition with the facility's mission, vision, and values.**

- Connect recognition and incentives to expected behaviors.
- Leverage patient comments for individual and team success stories.
- Write notes to employees identified in the survey comments.
- Share positive feedback during daily huddles, department meetings, and leader rounds.
- Publish positive comments in newsletters, intranet communications, and on bulletin boards dedicated to a recognition process.
- Make recognition personal, specific, meaningful, and timely.
- Publicly acknowledge accomplishments, including innovation.
- Engage the team in peer recognition, such as a nomination process for awards or daily huddle kudos.
- Include notes in staff members' personnel files so they may be formally recognized during the performance review process.
- Celebrate with food and fun.
- **VIDEO:** [Recognizing Excellence](#)

## Standards of Behavior

---

Culture is shaped by how the providers and staff behave toward patients and colleagues across the organization. The resulting environment influences patient, workforce, and operational outcomes—including safety, quality, and patient experience. Formally drafted behavior and service standards set the tone for culture and are essential to upholding accountability.

For example, without standards of behavior, it is possible for unhealthy interpersonal dynamics to develop within teams (e.g., competitiveness, large authority gradients, bullying). When these concerns are not addressed, both employee engagement and patient experience will suffer. We will see a lack of focus (i.e., if we are in “survival or “self-protection” mode we are not focused on the patient, nor are we likely to be fully situationally aware), less stability (i.e., more absenteeism and turnover), and more disruption (i.e., employee relations issues and manager time focused on problem solving rather than being future-focused).

### **Establish clear behavior expectations.**

- Align all standards of behavior with the organization’s mission, vision, and values statements.
- All standards must be accessible and understandable by all staff.
- Behavior standards should be universal across the enterprise.
- Include service expectations for phone, email, text, and in-person communication.
- Include behavioral expectations for attending daily huddles, speaking up for safety, and reporting safety events (including near misses).
- Include behavioral expectations for professional courtesy and staff interactions.
- A clear set of manager expectations must exist to ensure consistent training, monitoring, and accountability for standards—especially relative to staff management and discipline, and communication.
- **VIDEO:** [Set Specific Behavior Standards](#)

### **Train employees and providers.**

- Set the tone for the importance of service in new employee orientation. Help new employees understand the importance service holds in your organization.
- Conduct Service Behavior Training on a regular basis. Refer staff who are not upholding service standards for additional training.
- Develop a formal training program:
  - Apply a project management process to communicate action items, responsibilities, and deadlines, and to track progress.
  - Define trainer criteria and identify trainers.
  - Train the trainers.
  - Design interdisciplinary learning sessions.
    - Include attendees from various departments and disciplines at each training, such as physicians, care providers, nurses, medical assistants, registrars, schedulers, and billing.

- Set a schedule of training offerings to ensure everyone can attend both modules. Create a calendar.
- Track attendance.
- Embed training in orientations for new employees and in leadership training.
- Have senior leaders initiate trainings with a 15-minute presentation about the purpose, including why service behaviors matter for our patients and colleagues.
- Develop a communication plan to distribute the message about the training and its purpose (who, what, when, where, and why) enterprise wide using all mediums for communication at your disposal.
- Involve marketing to develop materials that will build enthusiasm for the effort.
- Provide mandatory annual courses.
- Assess the effectiveness of the training. Can front-line employees describe the organization's behavior standards and why they are important?
- Promote the standards on an ongoing basis.
- Mention behavioral expectations during daily huddles.
- Use multiple modes of communication to share reminders and prompts (e.g., intranet posts and newsletters).
- **VIDEO:** [Communicate the Why](#)
- **VIDEO:** [Model Expected Behaviors](#)

**Hold everyone accountable for behavior and service standards.**

- Build expectations into job descriptions and annual reviews
- Recognize and reward service excellence.
- Discuss service behaviors during leader rounds on staff.
- Conduct observations and discuss findings. Create an observation checklist.
- Provide service behavior reminders in follow-up communications (e.g., in newsletters and intranet posts).
- Measure provider and employee compliance.
- Include an evaluation of behavior and service standards in provider and employee annual performance reviews.
- Use an Appreciative Inquiry approach—empower staff to identify successful solutions to known issues.
- Present service standards as guidelines to achieve desired outcomes for each patient. This makes the connection between standards and the mission of health care.
- Immediately address any concerns about bullying, rudeness, or unprofessional behavior that may undermine how well employees work together.

## Talent Strategy

---

The following key touchpoints for intervention in the talent lifecycle are most relevant to the work of driving toward and sustaining a culture of safety, quality, patient-centricity, and employee engagement. The elements below are interrelated and should be addressed concurrently as part of the overall talent management strategic plan.

### **Attract talent.**

- Ask questions such as:
  - What is the current view of the organization in the labor market? How do we compare to our competitors in the eyes of potential candidates? How are we monitoring this?
  - What efforts are we making to define and create our narrative as an employer that is aligned with our mission, identity, and patient promise?
  - What is the recruiting experience like for potential candidates? How do they find us, or how do we find them? What does that first touchpoint feel like and what does it say about us?

### **Select talent.**

- Ask questions such as:
  - Beyond “fit,” or an ability to fill the minimum requirements of the role, what are the non-negotiables that will ensure we select those that align with our vision for safe, high-quality, patient-centered care?
  - Have we defined the “candidate experience” and what we want that to be/feel like?
  - How are we building engagement during the selection process? Are we using messaging, mentors, and making connections to our senior leadership, coworkers, and culture?

### **Orient talent.**

- Ask questions such as:
  - What is the content of the orientation? Is it focused on true cultural onboarding, or policy and form submission?
  - How would a newly oriented employee describe the “vibe” of the day (e.g., interactive and engaging, long and tedious, confusing)? How would you want them to describe it?
  - Is there a formal orientation for work-units that includes essential engagement elements of welcoming, valuing the person, and building connections and identity? How are leaders supported in making this happen in their departments? How do we evaluate the quality of the unit-level orientation experience?

### **Engage talent.**

- Ask questions such as:
  - What touchpoints exist with new hires after the orientation?

- How is the safety, quality, patient experience narrative woven into the touchpoints?
- How do we address early warning signs of disengagement or role mismatch?

**Grow talent.**

- Ask questions such as:
  - Do scores on your employee culture and engagement survey consistently score low (either organization-wide or for specific groups) for career development items? Do these scores correspond with areas with high turnover rates?
  - If you conduct exit interviews, do you hear people talk about development opportunities as a contributing factor to their resignation?
  - Do you think the average employee has a clear idea of what their possible career paths could look like?

**Retain talent.**

- Ask questions such as:
  - Does the organization engage in workforce planning activities to predict future needs and make proactive adjustments to the talent strategy?
  - Does the organization conduct “stay interviews” with employees in key roles or in departments that are expected to grow/be of high future value? How do you act on that feedback?
  - Are leaders conducting regular 1:1 meetings with their direct reports? Do these meetings focus (at least in part) on how the employee is feeling overall about their employment situation, their goals, challenges, and current level of engagement? Are leaders empowered to “raise a red flag” when a strong performer shows signs of intent to leave and supported in proactively retaining that person?