



ODP LIFECYCLE (NEW HIRE) 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 New Hire 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.

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CONTENTS

Job Requirements	5
Section Definition	6
Voice of the Workforce	6
Section Items	6
Improvements.....	6
Employee Input	7
Section Definition	8
Voice of the Workforce	8
Section Items	8
Improvements.....	8
Information	9
Section Definition	10
Voice of the Workforce	10
Section Items	10
Improvements.....	10
Training/Mentoring	11
Section Definition	12
Voice of the Workforce	12
Section Items	12
Improvements.....	12
Points of Contact	13
Section Definition	14
Voice of the Workforce	14
Section Items	14
Improvements.....	14
Welcoming	15
Section Definition	16
Voice of the Workforce	16
Section Items	16
Improvements.....	16
Organizational Culture	18
Section Definition	19
Voice of the Workforce	19

Section Items	19
Improvements.....	19
Job Expectations.....	20
Section Definition	21
Voice of the Workforce	21
Section Items	21
Improvements.....	21
Work-Life Balance	22
Section Definition	23
Voice of the Workforce	23
Section Items	23
Improvements.....	23
Job Fit.....	24
Section Definition	25
Voice of the Workforce	25
Section Items	25
Improvements.....	25
Engagement	26
Section Definition	27
Voice of the Workforce	27
Section Items	27
Improvements.....	27
Orientation	29
Section Definition	30
Voice of the Workforce	30
Section Items	30
Improvements.....	30
Relocation.....	31
Section Definition	32
Voice of the Workforce	32
Section Items	32
Improvements.....	32
New Leader.....	33
Section Definition	34

Voice of the Workforce	34
Section Items	34
Improvements.....	35
Appendix: Supporting Tactics	36
Data Use and Learning	37
Comment Analytics	37
Learning Collaboratives.....	38
Strategic Engagement Assessments	39
Continuous Listening	42
Process Improvement	44
Continuous Process Improvement	44
Sustainability	46
Change Readiness.....	46
Leader Skill Development	47
Rewards and Recognition Programs	49
Standards of Behavior	50
Talent Strategy.....	52

JOB REQUIREMENTS

JOB REQUIREMENTS

SECTION DEFINITION

The survey items in this section measure an employee's ratings of how well the organization has prepared them for the requirements of their job. This includes such factors as the legal obligations related to their position, policies and procedures, job expectations, and how the job relates to current work unit initiatives.

VOICE OF THE WORKFORCE

- “My job description gives me the opportunity to help care for patients as needed and the ability to help the nurses as well.”
- “The new hire experience was wonderful. The struggle began once I was finished training and was asked to do things outside of my job description.”

SECTION ITEMS

- I have been made aware of any legal obligations I have related to my position.
- Organizational policies and procedures have been explained to me.
- Written materials related to organization policies are easy to understand.
- I know what is expected to me in my job.
- I understand how my job relates to current initiatives in my work unit (e.g., ongoing action plans, improvement efforts).

IMPROVEMENTS

- Discuss with your new hire how goals and performance will be measured and how rewards/consequences will track to the individual's performance.
- Set and communicate clear expectations of your new hire's role.
- Have an open-door policy for all questions.
- To ensure direct reports' accountability, set goals and outline expectations (e.g., deliverables, due dates) for each employee before assigning any project/task.
- Provide background materials to help familiarize your new hire with their work environment.
- Provide new hires with written information on administrative policies and procedures.
- Make sure your new hire is appropriately trained on any new improvement initiatives in their work unit and that they understand how their job relates to the initiatives.
- **VIDEO:** [Share the Why](#)

EMPLOYEE INPUT

EMPLOYEE INPUT

SECTION DEFINITION

The survey items in this section measure an employee's perceptions of how their input is welcomed and valued as a new hire. This includes being able to ask questions about their job and the organization during the onboarding period. It is also a reflection of whether the new hire feels their ideas are respected despite their short tenure, and how comfortable they feel expressing concerns about their job.

VOICE OF THE WORKFORCE

- “My nursing manager is extremely willing to listen and make changes to help me be successful on the unit.”
- “Listen and treat people the way you want to be treated. Look into what your other employees say.”

SECTION ITEMS

- I have been able to ask questions about my job during my onboarding period.
- I have been able to ask questions about the organization during my onboarding period.
- My feedback and ideas have been considered even though I am a recent hire.
- As a new hire, I am comfortable expressing any concerns I have about my job.

IMPROVEMENTS

- Encourage new hires to ask questions about their job and the organization. Explicitly ask for questions and reward, at least verbally, those who do ask questions.
- If employees are asked for input prior to decisions, clarify the type of input you are seeking and whether their ideas will be incorporated into the decision.
- Establish a block of time at regular team meetings to allow for employee input and discussion of decisions that will affect them. State the value of fresh perspectives and encourage participation from new hires.
- Respond to feedback in a neutral manner. Constructive responses include: “Thank you for sharing that with me,” “I appreciate knowing that,” and “Thank you for your feedback.”
- Institute leader rounds on staff and ask the following questions:
 - What are we doing well?
 - What are we not doing well?
 - What can we do to improve staff engagement and patient experience?
 - Do you have all the resources you need to do your job?
- **VIDEO:** [Leader Rounds on Staff](#)

INFORMATION

INFORMATION

SECTION DEFINITION

The survey items in this section measure an employee's perceptions of how well-informed they are regarding information about the organization and their job. This includes such factors as having useful information and resources about the organization available to them; understanding how to get additional information about their job, policies, and procedures; and knowing where to go on their first day.

VOICE OF THE WORKFORCE

- “The recruitment process was done with lots of good information, and it was helpful. Keep up the great work, one of the reasons I took the job.”
- “I would suggest that more information about locations in the hospital would be useful. No directions were given on where some of the trainings would occur, where to park, or where you would be working at.”

SECTION ITEMS

- Useful written information about this organization has been made available to me (e.g., an employee manual or website).
- Overall, I am satisfied with the resources about this organization that are available to me.
- I know where to go or who to talk to if I need information about my job.
- I know where to go or who to talk to if I need information about organizational policies and procedures.
- I knew where to go on the first day of my new job.

IMPROVEMENTS

- Meet with your new hire to review information about the organization and where to find additional resources.
- Outline the support available to your new hire and what to do if they need information about their job, or organizational policies and procedures.
- Spell out the “what” and “when,” in addition to the assistance they can expect. Ask what else you can do to ensure they continue to be successful in their role.
- Ease your new hire's jitters. Provide them with information on administrative policies and procedures in advance (e.g., dress code, directions, parking, where to go upon arrival for their first day, who to ask for upon arrival, etc.).

TRAINING/MENTORING

TRAINING/MENTORING

SECTION DEFINITION

The survey items in this section measure an employee's perception of the training and mentoring processes available to them. This includes such factors as receiving feedback and coaching about their job performance; having additional training and mentoring available to them; and feeling they have been given the necessary guidance to be successful at the organization.

VOICE OF THE WORKFORCE

- “I thought the training was excellent, my leads and managers are very helpful.”
- “The amount of training videos is ridiculous. It's to a point where I'm not able to pay attention that long.”

SECTION ITEMS

- The person I report to has given me feedback or coaching about my job performance.
- Additional training or mentoring opportunities have been made available to me.
- I have been given the necessary guidance to become a successful employee at this organization.

IMPROVEMENTS

- Identify opportunities to provide feedback to your new hire, both positive and constructive.
- When providing critical feedback, deliver constructive criticism that is actionable and will lead to improvement, rather than just letting the other person know the result was less than optimal. Suggestions or discussions about how to improve next time will make the feedback more effective.
- After feedback is given, make sure to follow up and note improvements or continued areas of focus.
- Have ongoing performance discussions with your new hire. Ask them how everything is going and if they have any concerns. Tell new hires what they are doing correctly and what they need to improve upon.
- Reserve time at the end of all staff meetings to recognize the performance of direct reports and to allow employees to recognize their peers for outstanding performance.
- **VIDEO:** [Recognizing Excellence](#)

POINTS OF CONTACT

POINTS OF CONTACT

SECTION DEFINITION

The survey items in this section measure an employee's ratings of how well the organization connected the new hire to important points of contact, such as their direct manager, Human Resources, and other key individuals.

VOICE OF THE WORKFORCE

- “Orientation with my manager was very informative and useful.”
- “In the beginning, it would be nice if new employees had direct phone access to the various roles in the HR department.”

SECTION ITEMS

- I have had an opportunity to meet individually with the person I report to.
- I have been able to meet with the Human Resources representative to ask questions about this organization.
- I have met with Human Resources after being hired to address additional feedback or concerns.
- I have been introduced to key people who I may need to interact with in order to do my job.

IMPROVEMENTS

- Ensure a meeting has been scheduled between your new hire and Human Resources within the first two weeks of hire to ask questions about the organization and discuss any questions or concerns.
- New hires should have regular contact with you, your immediate manager, as well as other senior management. Invite senior leaders to periodically attend staff meetings and provide updates to your team.
- Invite senior leaders to a staff meeting to provide an overview of the organization's mission, values, and strategy. Set aside time at the start of the meeting to introduce any new hires.

WELCOMING

WELCOMING

SECTION DEFINITION

The survey items in this section measure an employee's ratings of how well they were welcomed into their new role. This includes such factors as being made to feel welcome by new coworkers and direct management; having immediate access to tools and resources to do their job; and being treated as a valued work unit member.

VOICE OF THE WORKFORCE

- “My supervisor is amazing! As are co-workers, everyone has gone out of their way to make me feel welcome! Made sure I have all the resources I need. Also insist I ask for guidance and advice anytime.”
- “Feeling overwhelmed with information and no one in person to walk me through the resources.”

SECTION ITEMS

- My new coworkers made me feel welcome to the organization.
- The person I report to made me feel welcome when starting my new job.
- The tools and resources that I need to do my job were ready for me on my first day.
- I am treated as a valued member of my work unit.

IMPROVEMENTS

- Treat your new hire as a guest on day one.
- Ensure the following is completed/scheduled:
 - A greeter at the door
 - An equipped/set-up workspace
 - (If budget allows) Welcome gift(s)—flowers, a coffee mug, lunch certificates, or other welcoming gestures
 - Lunch or coffee with a colleague
- Face time is critical during the welcome phase. Use several modes (not just email) to communicate with your new hire, including staff meetings, 1:1 meetings, bulletin boards, and lunches.
- Ensure a seamless first day. The preparation should start long before your new hire starts, including:
 - Grant building and system access
 - Secure workspace and any necessary technology (e.g., hardware, software, phone) with passwords and/or supplies to begin working right away
 - Confirm with new hire that they have the resources they need to be successful and understand how to use them
 - Assign a mentor to help get them started
 - Direct them to (or provide) training on how to access the organization's systems, common drives, email, etc.

- Be highly engaged with your new hire by providing regular contact, feedback, coaching, and praise.
- Consider providing a welcome gift each week, such as an organization coffee mug, t-shirt, pen, planner, etc. throughout the onboarding process.
- Keep the organization's mission and values top-of-mind with the new direct report. Share stories about model employees. Talk to them about how they have and/or can make similar contributions.

ORGANIZATIONAL CULTURE

ORGANIZATIONAL CULTURE

SECTION DEFINITION

The survey items in this section measure an employee's ratings of the communication about the organization's culture, mission, and values—as well as the extent to which the new hire understands how their job contributes to the organization's mission.

VOICE OF THE WORKFORCE

- “I love the culture and environment here. Everyone I have met is friendly and helpful, and I feel that my leaders really do want to see me to succeed.”
- “The only thing that I would say has been slightly discouraging is the morale on my unit at times. My fellow coworkers seem to be frustrated and angry with 'upper' management and hearing this on an almost constant basis tends to get very discouraging and at times concerning.”

SECTION ITEMS

- The culture and values of this organization were explained to new hires by a senior leader.
- I can explain this organization's mission to others.
- I understand the culture at this organization.
- I thoroughly understand how my job contributes to this organization's mission.

IMPROVEMENTS

- Communicate the mission, vision, and core values, even before individuals are hired and continue to do so after they start.
- Schedule a meeting for senior leaders to deliver the organization's mission and goals to new hires. Encourage a Q&A session. After the meeting, have managers meet one-on-one with their new hires to review the business plan and how the department's goals and objectives contribute to the organization's mission and goals.
- Using their job description as the map, walk your new hire through how their role fits into the overall mission and goals of the organization, and why their contributions are important.
- Regularly communicate an overview of the role, department, and organization. This will help your new hire understand the purpose of the role; type of work, and initiatives they will be engaged in—as well as the overall goals to accomplish.
- **VIDEO:** [Share the Why](#)

JOB EXPECTATIONS

JOB EXPECTATIONS

SECTION DEFINITION

The survey items in this section measure an employee's ratings of how their job met the expectations that were set during the hiring process. This includes such factors as how well the job was explained, the accuracy of the job description, and whether the workload is consistent with expectations.

VOICE OF THE WORKFORCE

- “I appreciate being able to be open and honest with my manager and that he provides me with guidance, but also allows me to learn/figure things out for myself.”
- “The job description was a lie.”

SECTION ITEMS

- My experience in this job is consistent with how the job was explained to me during the hiring process.
- During the hiring process, I was provided with an accurate description of the work I would be doing in this role.
- The amount of work I have been given is consistent with my expectations per the job description.

IMPROVEMENTS

- Define what success looks like for your new hire. Provide key performance indicators (KPIs). Meet weekly (for the first month) to discuss progress.
- Be clear when setting goals. Follow the SMART format to ensure goals are Specific, Measurable, Achievable, Relevant, and Time-Bound.
- Discuss with new hire how goals and performance will be measured, and how rewards/consequences will track to the individual's performance.
- Clearly define the skills, knowledge, and behaviors (competencies) of successful performance for the role and include this in the job description shared with the candidate.
- On a regular basis, communicate an overview of the role, department, and organization to ensure understanding of the role's purpose; type of work and initiatives they will be engaged in; and overall goals to accomplish.
- Ensure new hires are assigned tasks and held accountable while they acclimate to the culture of the organization and their new role.
- Reshare the job description with your new hire. Describe the work in detail. Be open to questions. Review how success will be measured in the role.
- **VIDEO:** [Set Specific Behavioral Standards](#)
- **VIDEO:** [Share the Why](#)

WORK-LIFE BALANCE

WORK-LIFE BALANCE

SECTION DEFINITION

The survey items in this section measure an employee's ratings of their work-life balance. This includes such factors as their schedule and workload.

VOICE OF THE WORKFORCE

- “I like my hours, and the pay is good for what I do.”
- “The breaks are short, and staff culture is to work late and/or through breaks which only furthers stress and frustration. Staff are expected to find coverage for their shifts when requesting a day off which I find very off putting.”

SECTION ITEMS

- My work schedule meets my needs.
- My work schedule is comparable to my expectations when I took this job.
- My workload allows me to have an appropriate work-life balance.

IMPROVEMENTS

- During one of the first meetings with your new hire, review the typical start/stop time, breaks, and number of hours per week that are expected.
- Ensure they can follow the schedule and share what flexibility you and the organization have around work schedules. Agree on a regular schedule.
- Discuss any workload concerns your new hire may have. Devise a plan with the team to develop efficient work procedures and solutions. Create a list of key actions with metrics and then keep employees up to date on the progress that is made.
- Meet with your new hire around their 90-day employment and review the work schedule that was established in month one. Discuss the need for any changes to the schedule and agree on an updated work schedule moving forward.
- Understand what motivates employees of different roles, shifts, generations, tenure, etc. This will help managers and leaders develop programs that address the variety of what employees need to feel activated in their roles, and to be able to decompress when needed.
- Ensure employees understand how they are making a meaningful contribution to patients, to their colleagues, and to the organization. Doing so helps cultivate resilience and the ability to persevere in a challenging health care environment.
- **VIDEO:** [Communicate the Why](#)
- **VIDEO:** [Building Nurse Resilience](#)

JOB FIT

JOB FIT

SECTION DEFINITION

The survey items in this section measure an employee's ratings of how well the job suits their skills and abilities, and how well the new hire likes the work they are doing.

VOICE OF THE WORKFORCE

- “I love being able to interact and help the patients calling in. I love that this job is about helping people.”
- “I enjoy the type of work I do here, but I cannot say that I enjoy doing my job here due to the way I've been treated while employed here.”

SECTION ITEMS

- I like the work I do.
- My job makes good use of my skills and abilities.

IMPROVEMENTS

- Meet with your direct report and ask them what they like about their role and what engages them in the workplace. Obtain specific details.
- Ask your new hire one thing they would change about their work and partner with them to determine how to continue to improve their work experience.
- Be a champion for your team's career development. Provide input on their career development plans. For example:
 - Ensure plans include specific action steps
 - Align individual development with the needs of the organization
 - Help them gain new experiences (e.g., project management) that align with their goals
- Ensure team members understand that their development is their responsibility. They own the process.
- Ascertain your new hire's unique skills and abilities in one of your first meetings. Incorporate these into their role.
- Hold 1:1 meetings with your new hire on a regular basis. Provide quality feedback regarding their contributions to the team and organization. Discuss career goals and ensure they are aware of resources for development such as projects, workshops, e-learning classes, and tuition reimbursement benefits.

ENGAGEMENT

ENGAGEMENT

SECTION DEFINITION

The survey items in this section serve as an early indicator of the respondent's self-reported level of Engagement using key outcome questions. This includes such factors as feeling a sense of pride to work for the organization, being willing to recommend the organization as a good place to work and receive care, feeling a sense of belonging, and expecting to remain as an employee with the organization for a long time.

VOICE OF THE WORKFORCE

- “The mission and goal are to provide incredible care for our patients. As a new employee, you can tell that mission is taken seriously everyday/every patient.”
- “I was excited to start working here, but now I’m questioning my decision. There’s a lack of communication from leadership, my manager seems burned out, and my coworkers get irritated when I ask a question. Part of the mission statement is supposedly ‘we care for our caregivers,’ but I don’t see it.”

SECTION ITEMS

An effective engagement strategy targets the drivers of engagement, rather than engagement as a global metric. To achieve positive employee engagement, it is important to work on drivers such as job fit, communication, career development, etc. Focusing improvement efforts on the drivers of engagement will lead to increased overall engagement.

The recommendations in the “Improvements” section to follow can inform action plans on the aspects of new hire engagement listed below:

- Overall, I am satisfied with the onboarding process.
- I am proud to tell people that I work for this organization.
- I would recommend this organization to family and friends who need care.
- Based on my experiences so far, I would recommend this organization as a good place to work.
- I expect to remain an employee at this organization for a long time.
- I would stay with this organization if offered a similar job elsewhere.
- I feel like I belong in this organization.

IMPROVEMENTS

- Schedule a Q&A session where senior leaders talk about the organization and why it is a great place to work. Encourage questions by asking your direct report to generate three questions prior to the meeting.
- Share the organization's strategy, five-year plan, and vision for your location on a regular basis.

- Empower your employees by increasing their involvement in decision-making—individually or as a group—during staff meetings.
- To increase long-term engagement, implement job rotations and/or cross-training opportunities for employees to learn new skills and explore new potential roles within the organization.
- Share the vision, mission, and goals of the organization with enthusiasm. Include specific success/impact stories and detail the organization’s uniqueness. Identify how the culture supports employees.
- **VIDEO:** [Using Comments to Tell a Story](#)

ORIENTATION

ORIENTATION

SECTION DEFINITION

The survey items in this section measure an employee's ratings of how well the organization conducted new hire orientation. This includes such factors as the information received prior to orientation and whether the orientation was effective.

VOICE OF THE WORKFORCE

- “The orientation at home is really positive, it takes the pressure off and made me feel really comfortable on my first day not worrying about getting to a location, etc. I was mentored by colleagues and my manager from day one (even before I started there was communication), it was a very positive experience.”
- “Challenging department-specific onboarding; there wasn't a lot of guidance, my direct superior was out of town and there wasn't a lot of direction with who should be "orienting" me in her absence.”

SECTION ITEMS

- I received a tour of the facility during my orientation.
- The orientation program for new hires was informative.
- I received good information about the orientation program before it began (e.g., driving/parking instructions, dress requirements, meal/break info, etc.).
- I was provided with an effective orientation to this organization.
- I was provided with an effective orientation to my role.

IMPROVEMENTS

- Explain the inner workings of your workplace to all new hires: benefits, insurance, organization history, and a high-level view of the organization's culture, mission, and vision.
- Develop a checklist to ensure the following actions are completed prior to the new hire's start date:
 - Communicate start date, location, parking, work hours, and dress code
 - Fulfill computer/technology needs
 - Assign a mentor
 - Prepare/request day-one documents (e.g., I-9, insurance, etc.)
 - Create new hire's calendar for the first two weeks and include regularly scheduled meetings (e.g., staff and department)
- Review SMART goals (i.e., Specific, Measurable, Achievable, Relevant, and Time-Bound). Discuss measurement to ensure they understand how to be successful.
- Be clear when setting goals. Discuss with new hire how SMART goals and performance will be measured, and how rewards/consequences will track to individual's performance.

RELOCATION

RELOCATION

SECTION DEFINITION

The survey items in this section measure an employee's ratings of how well the organization handled the new hire's relocation needs. This includes such factors as information provided about the local area, whether direct management has been understanding about relocation issues, and if coworkers have helped the employee to adjust to living in a new area.

VOICE OF THE WORKFORCE

- “Treated very well by HR, manager, housing assistance person. Felt like they really wanted me here. Felt like I was valuable to them.”
- “It was quite ridiculous that the background check and other onboarding could not be done before relocating.”

SECTION ITEMS

- Information for employees new to the area was made available to me (e.g., info about housing, schools, and other key resources).
- The person I report to has been understanding about issues related to relocating to this area.
- My new coworkers have helped me get used to living in a new area.

IMPROVEMENTS

- Provide written and online information to new hires about living in the area, including housing, schools, and other resources prior to their relocation.
- Be highly engaged with your new hire by providing regular contact, feedback, coaching, and praise. Proactively ask question about how they are adjusting to the area and what help they need.
- Schedule weekly 1:1 lunch meetings with colleagues and stakeholders to help the new hire to build rapport, establish new relationships, and get used to living in the area.

NEW LEADER

NEW LEADER

SECTION DEFINITION

The survey items in this section measure a new leader's ratings of how well the organization set them up for success in their new role. This includes such factors as feeling ready to assume their new responsibilities, understanding how their role contributes to the vision and values of the organization, being supported from a development standpoint, and having connections with important points of contact.

VOICE OF THE WORKFORCE

- “The overall culture is very supportive and welcoming. I feel like I can learn and grow here.”
- “Being a new hire to a leadership role, my onboarding mandatory training was longer than non-leadership roles. Deadlines given to complete training were short-dated.”

SECTION ITEMS

Responsibilities

- I understand the responsibilities of my new leadership role.
- I was informed of the key success factors for my new leadership position.
- I am ready to assume the responsibilities of a new leader at this organization.
- I have been involved in discussing the initial goals and priorities of my new position.

Vision and Values

- I know how I contribute to this organization's vision.
- I know how to demonstrate the core values of this organization with my behavior.
- It was explained how my role contributes to the priorities of this organization.

Development

- I have received coaching or an assessment to identify my strengths and improvement opportunities as a new leader at this organization.
- I have been encouraged to complete a leadership development course/workshop.
- I have been assigned a leadership mentor to foster my development.
- I have been trained on how to handle critical management functions (e.g., scheduling, budgeting, etc.).

Points of Contact

- I have met with key stakeholders who rely on the functional area that I now lead.
- I was introduced to the individuals who now report to me.
- The area I am now responsible for was prepared for a new leader before I officially started in this position.

IMPROVEMENTS

- Prepare new leaders for assuming their responsibilities by establishing an orientation program. Leaders should attend the program within 90 days of starting their new role. Include topics such as the following in the program curriculum:
- Expectations and responsibilities of all leaders
- Key success factors for leaders
- How leaders contribute to the organization's mission, vision, and priorities
- How leader behaviors are linked to the organization's core values
- Involve new leaders in discussing the initial goals and priorities of their new position.
- Make leadership development a top priority by offering courses and workshops on a variety of leadership competencies.
- Assign a leadership mentor to help foster new leader development.
- Ensure the new leader receives training on critical management functions of their new role, and that they have opportunities to meet with key stakeholders who rely on the new leader's functional area.
- Prepare teams and work units in advance of the new leader's official start date. Set the new leader up for success by introducing them to the individuals who will report to them.
- Provide new leaders with an assessment that identifies their strengths and improvement opportunities. Support the assessment with coaching to help the new leader grow their skills.
- **VIDEO:** [Model the Behavior](#)
- **VIDEO:** [Overcoming the Authority Gradient](#)

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?