Project and Standard Identification Form

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Project Number:
Project Name: New Employee Orientation Redesign
Year Work Completed: 2013
Standards Met*: **Principles: 1 x☒ 2x ☒ 3x ☒ 4 x☒** **Process: 5 ☒ 6 ☒ 7 ☒ 8 ☒ 9 ☒ 10 ☒**
Project Description: *XXX International is a global independent public health organization that specializes in writing standards, laboratory testing, and certifying products for the food, water, health sciences and consumer goods industries. XXXemploys approximately 2,000 people and operates in more than 150 countries.* *Convert the existing New Employee Orientation (NEO) program for XXXInternational from a full day workshop to an online program that lasts throughout* throughout the first year of employment. *The program must allow "…that every employee, everyday, in every place feels connected."* *Deliverables:* • *5 online learning modules* • *MAP (Master Activity Plan) – employee version* • *MAP (Master Activity Plan) – manager version* • *New employee website portal* • *Online manager course*
Your Role: Performance Improvement Consultant, responsible for Instructional Design Development and Evaluation of all deliverables.

***To check a box, double-click the left mouse button over a box, click on properties, and click the checked button under Default to convert it to a checked box**

Work Description Form

Project Name:	**New Employee Orientation Redesign**

Standard 1: Focus on Results or Outcomes

Describe what you did to ensure your clients and stakeholders were focused on the desired results or outcomes.

The goal of the program is "…that every employee, everyday, in every place feels connected." This high level goal was always considered while working with subject matter experts and the training team. It was especially important when considering the international locations new employee orientations (NEO's). Managers and directors were redirected if their vision did not match this goal. The goal was reinforced through email and in person communications throughout the design process. If the proposed program deviated at different company locations, we used *"…that every employee, everyday, in every place feels connected."* to keep the design focused.

A statement of work (SOW) was used to track the deliverables, maintain the timeline, and keep the team focused on each step of the goal. The SOW was on Aesop, the company's document online system, to monitor progress and apprise the stakeholders of the project's progress throughout the process.

Standard 2: Take a Systemic View

Describe what you did to ensure your clients and stakeholders took a systemic view. Include at least 3 of the following: society, marketplace, workforce, workplace, work, and worker.

I introduced systems theory to the design team and managers. I explained how XXXInternational is an open system, affected by the outside environment as well as different parts of the organization. We brainstormed the systems affected by the new program. This brainstormed list was referred to at all the planning sessions to keep the systems thinking going during each phase of the process.

Here is a list of some of the areas we discussed:

New Employees

- The NEO program affects new employee retention rates, attitudes and referrals. The new employees are better equipped to start their jobs any day of the week the manager needs them, instead of on a certain date. This has a direct effect on the productivity of the departments (*work)*.
- The attitudes of the employee will have an effect on the other workers, management (*workforce)*, and the company culture as a whole *(workplace).*
- Since the program allows new hires to start sooner, customer service improves which may even affect the reputation of the whole company *(marketplace).*

Existing Employees

- The attitudes and behaviors of the current employees affect the retention rates of the new employees. Encouraging welcoming behaviors from existing employees is crucial to the new NEO program. *(workers).*

- The interaction between new and existing employees works to create the culture of our company (*workplace).*

Management

- Senior and mid-level managers have a big effect on the program. If they embrace it, it will be encouraged and followed. If they choose to ignore the program or use some of the old onboarding strategies, the benefits of the new program won't be long term. I shared the importance of having buy-in from managers to senior management in order to get the approval of a mandatory 2 part online course that focused on the WHY of the new program as much as the HOW for management *(workers, workplace).*

Marketplace

- Our mission of "improving public health" was a guiding principle when building the new course.
- By seeing how a stronger NEO program can affect customer service, (higher retention rates, faster service, increased productivity), the team could easily see how society as a whole is affected by our programs. (For example, providing clean water, testing food supplements, certifying products for health and safety).

Workplace

- The culture of the environment will affect the new employee by being welcoming and positive. No matter how good our NEO program is, if the culture is bad, employees simply won't stay (*employees).*

Standard 3: Add Value

Describe what you did to add value.

During the NEO redesign project, I added value by conducting the needs assessment which yielded data to support the online NEO format. I was part of the initial team that interviewed new and former employees, as well as managers and directors, to determine what was needed in the new program. The gaps at which employees were NOT getting the same experience were clearly documented. Using the information from the needs assessment, I recommended a variety of solutions designed to fill the gaps. Extra material and steps from the original program were eliminated, saving time and resources for the employee and managers.

I focused on improving productivity and cutting costs throughout the project. During the design of the online courses and new employee website, I proposed ways to eliminate the need for a lot of future updates and how to make the programs ready for global translation in the future, saving time and money for redesign at a later date. Some of the proposals I made were:

- Templates that keep the information that never changes as the base of the program.
- Templates that allow the training department to easily update the course year by year with

clear guidelines on how to do this, including a checklist on items that may need to be updated.

- Following global eLearning rules (For example, simple sentences, leaving a lot more space for translation, keeping images appropriate for all locations, and leaving out humor and nuances that may not translate.

The team relied on my experience and knowledge to produce a cost efficient, productive NEO program that filled in the learning gaps in the previous NEO course.

Standard 4: Work in Partnership with Clients and Stakeholders

Describe what you did to facilitate a collaborative relationship with the clients and stakeholders.

You *may* create a table that lists the clients and stakeholders (by position/title) that you partnered with throughout the project. One option is to include the role of the position/title on the project, how you partnered with them throughout the project, and the impact each partnership had on the program's results or outcomes.

Position	How we partnered	Impact
Recruiters	We collaborated to find out what new employees need when they first start, what new employees are looking for in the new job and other gaps that occur during the first few weeks of employment.	• The data was used to fill in gaps discussed by the recruiters so employees are better prepared to start at XXXInternational. The communication (emails and website) were updated to include all the new data that was previously missing. • The new employee paperwork and submission process was streamlined according to recruiter's needs. This resulted in less time needed by recruiters in the NEO phase.
Managers	The design team worked together with managers to make a list of things the NEO program should encompass, how long it should take, and when the new employees should start.	• As a result of this partnership, the design team was able to make the program online so employees can take it in parts. This allowed managers to get the help they need sooner, on any day of the week. • The information gathered was used to include missing data that new employees should know, including how to access the data

		after new employees have been there for a while. This decreased the amount of questions and confusions from new employees. • The data gathered during this collaboration helped to make the Master Activity Plan (M.A.P) more productive and efficient.	
Recently new employees who went through old NEO	The design team gathered data and collaborated with recently hired employees to get advice for new employees as well what the new employee liked or didn't like about the old program.	• This collaboration resulted in a series of advice videos for new hires. • It also gave insight to some things what were missing in the old program (for example, certain job aids, reference material, and more education on the company Intranet). • The collaboration was used to design a better M.A.P. that new employees could really use during their first year.	
Long-term Employees	Long term employees were interviewed to see what advice they would give new employees, their views on how long-term employees interact with new employees, and the culture surrounding a new employee.	• These interviews resulted in a continuation of advice videos for the program. • The partnership brought to the surface the mentoring process and how well employees were engaged. • This resulted in an update of the M.A.P. to include steps a mentor should be taking after the employee is hired. • Content was added to the manager course that included ways to welcome new employees as a result of this collaboration.	
Senior Management (HR Director)	The design team partnered with the HR Director to get the senior management perspective and buy-in.	• As a result of this partnership the company mission of protecting public health was integrated into the program whenever possible. • Permission was granted to	

		develop the mandatory 2 part manager course. • Funds were granted to purchase technology, software, and online subscriptions to make this program successful.

Standard 5: Determine Need or Opportunity

Describe your work in meeting this Standard by answering the following questions.

1. **How did you define and scope the project?**

   We conducted interviews with the HR Director who requestedthe course. We also sent out surveys and conducted interviews with current employees, newly hired employees, managers and global human resources employees.

   We brought together the development team and HR Director to create a Statement of Work when all the data was compiled.

   It was decided that the main goal is "…that every employee, everyday, in every place feels connected." By reaching this goal, we will fill the certain gaps in the current program.

   1.) Increase employee retention

   2.) Decrease manager and mentor time answering new employee questions

   3.) Improve the overall culture with a more stable and welcoming workforce

2. **What performance level(s) did you investigate and why? Each project requires the inclusion of at least 3 of the following levels:** society, marketplace, workforce, workplace, work, and worker.

   - Workforce: Standardizing the NEO process to include other global locations so the goal of "… every employee, everyday, in every place feels connected" required interviews with the human resources employees in different locations. The needs assessment focused on specific area benefits that differ from country to country, individual manager needs and employee retention rates. Recently hired employees were interviewed to discover gaps in the current program as well as overall impressions. Managers were interviewed and surveyed to find out what their new employees were lacking and require in the new NEO program.

   - Marketplace: The industry marketplace requires certain competency standards for certification companies. The competencies for new hires, especially in the safety area, were reviewed and included in the project. Calls to certifying bodies clarified competencies that must be included.

   - Worker: Recently hired employees as well as longer term employees were interviewed in person and through online surveys in order to design the NEO to meet their needs.

3. **What was your data sampling strategy?**

   - Random samples of employees were taken by assigning a number to each unit in the population and using a random number table to generate the sample list. This strategy was used to obtain the qualitative and quantitative data.

   - Stratified random sampling was used when choosing employees to represent the focus groups so all levels and departments were represented.

4. **What data collection and analysis methods did you use?**

   Both quantitative and qualitative data were collected to define the need. Quantitative data was

available by the Human Resources data system for data across departments, business units and locations. Qualitative data was obtained through survey and focus meetings, both individual and group, in person and through survey monkey. Individuals from the different departments, units and all locations were sampled.

Data Gathered:
• Employee retention rates by department • Total time of mentoring after current program • Cost of current NEO program • Literature reviews on effective new hire orientation content, process and length
Focus of Survey Questions:
• New employee readiness by management (How long does it take employees to get up to speed at their jobs? How well do they master the skills after the training?) • Gaps managers would like filled in new NEO program (What do managers want to see employees get in a new employee orientation that they are not currently getting?) • Gaps in current program reported by new employees within the last year (What skills do they wish were included in the program? How accessible was the material after the course? Did they feel prepared for their new job in terms of new employee orientation?) • Cycle time to train new employees in fundamental skills (What part of the scheduling and time commitment of the new employee orientation would managers like to see changed?
Data Analysis:
• Clustering was utilized to group the data to identify the important sources and types of variation among departments and level of employee. • Statistical data was charted and reviewed using frequency distribution in an Excel spreadsheet to determine employee retention trends at the 3 month mark and 12 month mark. Age group was also considered. Cross tabulation was used to compare data from different departments and age group? • Text analytics using Wordle were used to analyze the qualitative data from surveys and focus groups. Answers were inputted into the program, and word graphics were created to represents high and low frequency words found in open-ended survey questions. This was in addition to the clustering data.

5. Describe how the methods supported the purpose of the investigation.

Focus groups and surveys from managers gave us the qualitative data needed to design a program

to meet the time and task needs of managers.

6. **Describe the goal of the project in measurable terms.**

   The primary goal of the program was to give employees a similar experience at all locations so they feel more connected to headquarters. In order to measure this, we looked at the completion rates of new employees at all the different locations on the Learning Management System.

   The other benchmark was to improve new employee retention rates. These statistics are also readily available from the human resources data system and will continue to be monitored.

   Culture and productivity results will continue to be monitored through surveys translated into readable results (graphs, frequency distribution, wordle graphics).

7. **What performance deficiencies or unmet opportunities did you discover?**

   Some of the locations require more work than we expected in the areas of translation, learning strategies and social connection strategies.

   Also, in order to work for their population to access the NEO online program, IT needs to improve the data management system so all locations will have access. Some locations will also need more work to their version of the online course to meet cultural and language roadblocks.

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Standard 6: Determine Cause

Describe your work in meeting this Standard by answering the following questions.

- **How did you determine the underlying causes?**

The cause of employees around the world not getting an equal NEO experience was due to the Learning Management System not being implemented across locations and the NEO content not being online. The NEO was not individualized by country and every country/facility had to create its own program.

- **What cause(s) did this analysis uncover for each performance gap?**

The cause of the Learning Management System not being implemented in all locations is due to the IT network setup. I recommended the process of updating every location's system to be implemented before the NEO course is launched at all the facilities that XXXhas around the world. The cause of the previous course not being online was due to lack of technical expertise in the training department to convert the material into an effective eLearning format. My expertise was used to convert old material and create new material into an online format.

Standard 7: Design Solutions including Implementation and Evaluation

Describe your work in meeting this Standard by answering the following questions.

1. How did you design the solutions as they relate to the outputs of Standards 5 and 6?

In order to support the goal revealed by senior management of giving every employee an equivalent new employee orientation, a blended learning, long-term new employee orientation was planned. This will allow all locations to get the same common core of the new employee orientation program.

The online portion (5 courses) targeted the areas of focus revealed in the needs assessment:	
To meet the workers' needs:	• An online Compass module was designed for all the on-the-job training every employee needs to get started. • A M.A.P. was designed to guide the new employees through their first year.
To meet Human Resources' Needs:	• To meet the Human Resources needs, a benefits and harassment module were planned. (These modules are individualized by location).
To meet the managers' needs:	• An online safety course was planned. • A manager M.A.P. was created to guide managers throughout the employees first year. • An online format to meet the need of an employee on any day of the week instead of waiting for a live, new employee class to be launched as was the past practice.

2. How did you plan to implement the designed solutions?

Implementation of the solution was planned by using project management tools in Excel. Different members of the training team were responsible for different parts. We had weekly status meetings as well as group huddles for brainstorming and evaluation. We also worked with recruiters to plan when the best time to launch the new employee orientation would be, according to their hiring schedule.

3. How did you plan to evaluate the designed solutions?

- Each output went through several evaluations. An evaluation form was created for each of the online courses to be filled out by recruiters, human resources staff, and other members of the training department. After the initial reviews and suggestions were implemented, a second round of evaluations were sent out to marketing, training, some managers and a focus group of employees. The final evaluation was performed in a group setting. The current new

hires completed the online courses together with the training team all at once so the courses could be evaluated for technical issues and other concerns that were missed during the first two evaluations. Learner surveys were analyzed at this time. The M.A.P.s and online portal went through the same evaluation process.

- A return on investment analysis was conducted to determine if the cost of the training was justified. The cost of implementing a blended learning solution included design, development and evaluation, as well as the time associates spent out of production. The cost of the former program included time away from job for both employees and trainers, cost of extra mentor time explaining things not contained in the former program, and the costs of new employees starting every two weeks versus any day that the online version allows.
- Program benefits will need to be measured over time, including employee retention and increased productivity.

Standard 8: Ensure Solutions' Conformity and Feasibility

Describe your work in meeting this Standard by answering the following questions.

1. How did you ensure the solutions conformed to the design specifications during development?

The development team met regularly with subject matter experts and other stakeholders to be sure solutions conformed to the design specifications during development. Each intervention was thoroughly defined as well as the guidelines for developing the component.

The following list defines the interventions, objectives and guidelines (design specification) for the development team that was provided at regular stakeholder meetings.

Intervention	Objectives Targeted (Design Specification)	Intervention Guidelines
Online Compass Module	• Provide employees a similar experience at all locations so they feel more connected to headquarters.	• All employees must have an equal experience • The training must be done at anytime on any day • Must be able to track it in LMS • Employees must be able to refer to the information at a later date as needed
M.A.P. (Master Action Plan)	• Provide a visual process for the new employees first year • Provide a visual process for the Manager of the new employees' first year	• Document must be easy to update as changes occur • Document must be easy to read • Document must be on one

		page • All the steps must be listed on the document • Document must conform to the XXXdocument standards
Benefits Module	• Provide an online benefits module that can easily be modified per location	• Course must be easy to update as changes occur • Course must be easy to translate to other languages • Course must run on the LMS • Employees must be able to go back to the course as needed
Online Safety Course	• Provide an online safety module that has all information required by NSF	• Use the current Safety course as a guideline • Course must be able to run on the LMS • Final course must be approved by the quality department

2. How did you ensure the feasibility, workability, adoption, or success of the solutions during development?

- The development team met regularly with the IT department and Oracle administrator to make sure the online and website portion of the solutions could be implemented. The stakeholders in different locations throughout the world were consulted to find out requirements, both technically and culturally.
- The manager course was produced to get buy-in from managers since that was a key to the success of the program.
- Ongoing meetings with stakeholders were held in order to understand all requirements needed to continue the success of the program.
- A long-term plan was developed that included follow-up surveys, follow up learning activities and quarterly check ins so the program will be successful long term. A yearly review is scheduled to complete updates according to original design specifications.

Standard 9: Implement Solutions

Describe your work in meeting this Standard by answering the following questions.

1. What implementation strategies were developed to allow clients to sustain change?

Literature reviews reveal that manager buy-in is a large part of whether a new employee orientation is a success or not. A two part course was developed for managers with the goal of fostering manager buy-in.

- Part one focused on why a new employee orientation is so important. The course highlighted links of new employee orientation to productivity, finances and employee morale at the company. It also highlighted why the program would make managers jobs easier in the long run.
- Part two gave managers the needed skills and knowledge to administer the new program. This part of the training was given when a manager gets a new employee to increase effectiveness and relevance of the course.

Senior management buy-in was established. This buy-in assured the necessary resources and commitment to sustaining the program in the future.

2. What methods did you use to track or monitor the new behaviors or changes during implementation?

New behaviors were tracked using data entry, surveys and reporting tools from the data management system. Employees and managers received feedback and messages that related to the new expectations on an ongoing basis. Monthly reports are run in order to continue tracking of the new behavior. Those behaviors include management satisfaction, employee turnover rates and employee satisfaction.

3. What methods did you use to sustain new behavior or changes?

- Key message and video reminders were scheduled to be released strategically throughout the 1st year of implementation
- Check-in activities are planned throughout the year so managers will stay on task with the new employee orientation program.
- Surveys and issues are brought up during management meetings to continue future evaluation of the program.

Standard 10: Evaluate Results and Impact

Describe your work in meeting this Standard by answering the following questions.

1. How was the impact of the solution measured in terms of a change in results or outcomes on individual, team, or organizational performance as identified in Standard 5?

Workers: Equalizing the NEO process at all global locations so the goal of "… every employee, everyday, in every place feels connected".

Evaluation methods included:

- Analyzing monthly reports to check completion rates at all the locations.
- Analyzing new employee surveys throughout the first year to measure the experience and connection between locations.

- Comparison of new and old employee orientation in terms of retention rates, employee satisfaction and manager satisfaction

Marketplace: The marketplace requires specific competency standards for certification companies. The competencies for new hires, especially in the safety area, were reviewed and included in the project. Calls were made to certifying bodies in order to clarify competencies that must be included in the new employee orientation.

Evaluation methods included: Documentation that the new employee orientation program meets all the current requirements mandated by the certifying bodies on a yearly basis.

Workforce: The NEO program needed to meet the needs of the workers, managers and increase employee retention.

- Employee retention statistics were monitored quarterly and compared to previous reports. Yearly reports to examine employee retention at the 1 year and 90- day marks were tracked and analyzed.
- Manager and employee surveys were administered to get feedback on how well the employee and managers needs identified in the needs analysis were being met.
- Feedback from managers at monthly manager meetings was recorded and compared to previous feedback.

Workplace: The Return on Investment was measured by comparing the previous new employee orientation metrics versus the same metrics after the new program was implemented.

Some of the factors documented were:

- Cost metrics of using a full day to orient new employees versus starting new employees any day of the week.
- Productivity metrics of current new hires were compared to new hires that went through the old program. These metrics included time needed for on the job training, amount of time until an employee was able to contribute to the department and number of work orders completed by the department as a whole.
- Estimates of projected increased employee retention metrics(based on current retention rate findings) were included to show the possibilities if the program is sustained.

2. **How was ongoing evaluation integrated into a performance sustainment and/or continuous improvement strategy?**A plan to revisit the program on a quarterly basis was created, including a plant to revise the current program according to the findings. Some of the ongoing evaluation strategies are listed below:

Surveys are sent out to new employees and managers quarterly to monitor the new employee orientation and how it is meeting future needs of the company. Literature review is scheduled quarterly to document changes in the competencies in order to keep the new employee orientation compliant. A yearly evaluation of content and company-wide changes was scheduled.