

# New Leader Onboarding

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[WWW.CAPSTONELEADERSHIP.NET](http://WWW.CAPSTONELEADERSHIP.NET)

# RESOURCES

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- First Days Checklist  
<https://drive.google.com/open?id=1I17US4FrB01zue6-JWmBbb2AqvItGaDS>
- New Leader Learning Series TEMPLATE  
<https://drive.google.com/open?id=189SPnIdX2E4b0k0U6vUA0ez8Dq36cZRP>
- New Leader Onboarding Plan  
<https://drive.google.com/open?id=1KF9ZNU-pfi11yBuuWI7GDELrfl3KrOL8>

# New Leaders . . . .

1. Internal or External
2. Leadership Experience
3. Training – Formal, Informal
4. Advanced Degrees

# 5 Key Objectives - Onboarding

- ✓ Engaging the new leader in the vision & strategies of the organization
- ✓ Connecting the new leader to the culture of the organization
- ✓ Facilitating the establishment of interpersonal relationships and information networks
- ✓ Increasing clarity, competence, and confidence
- ✓ Teaching the necessary regulatory, legal, accreditation, & policy requirements

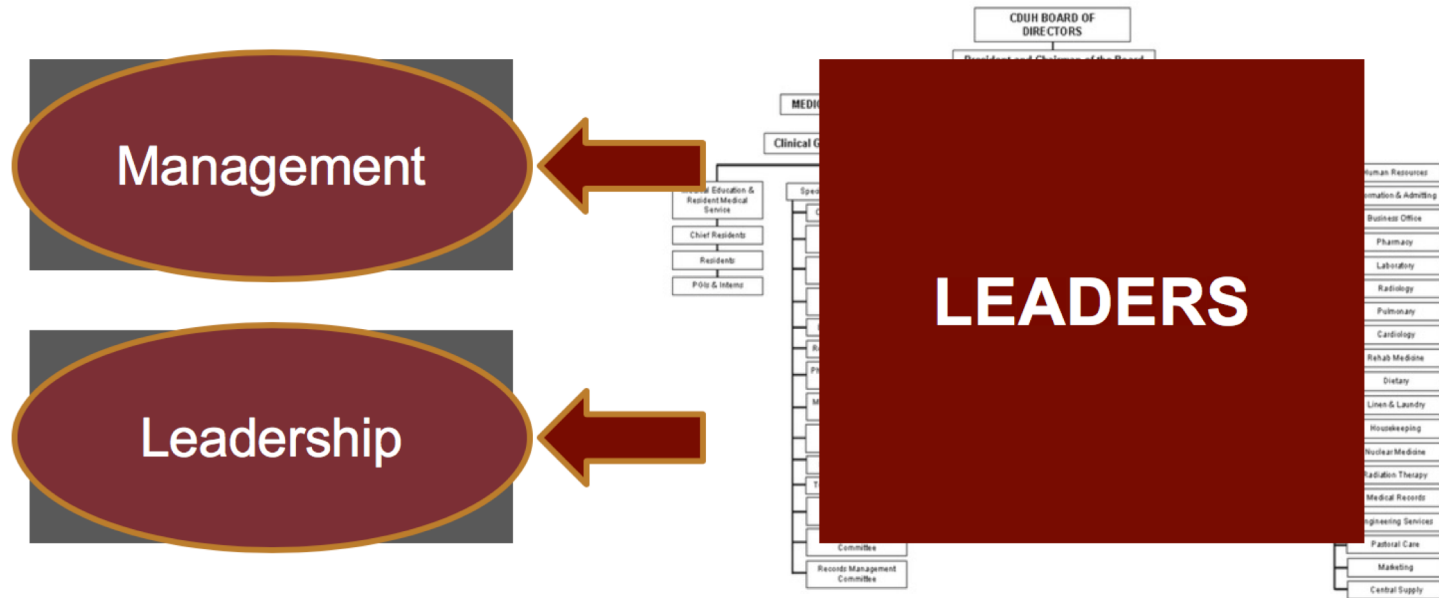


# Onboarding...

## .....“Takes a village”



# Leadership...



**LEADERSHIP BUNDLE...**

# **STANDARD WORK**

# Categories of Leadership Tactics

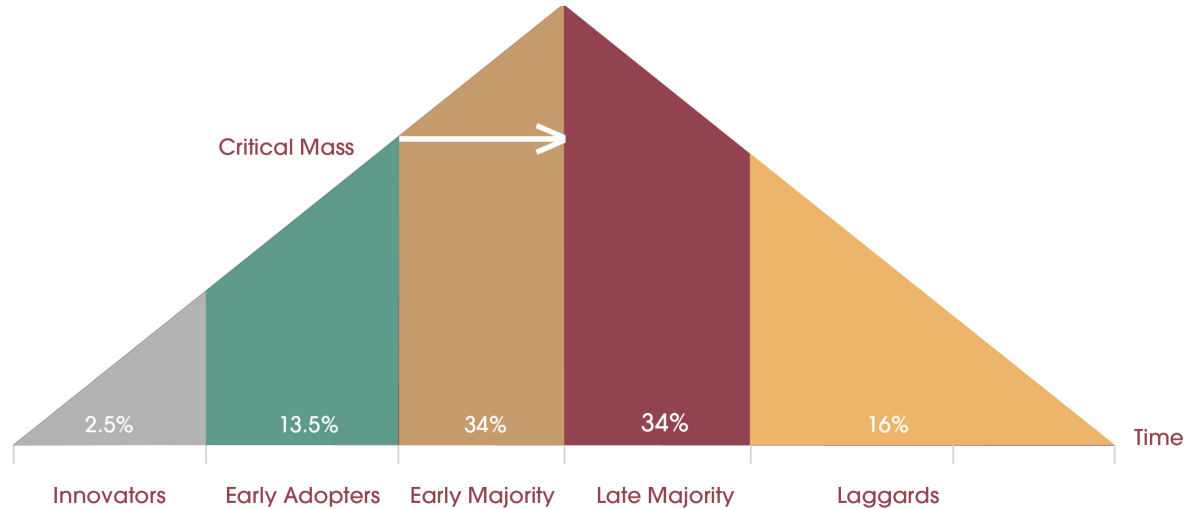
<b>Selecting and On-Boarding</b>	<b>Transparent Communication</b>	<b>Leading Change</b>
<b>Building and Strengthening Relationships</b>	<b>Setting and Achieving High Standards</b>	<b>Executing a Robust Goal Cycle</b>
<b>Impactful Feedback/ Performance Management</b>	<b>Grateful Leadership</b>	<b>Increasing Resiliency</b>

## EXAMPLE: Leadership Responsibilities Checklist

# EXAMPLE...

DAILY	√	Notes
Rounding (Employee, Inter-departmental, Physician)		
Validation (Patient) Rounding		
Daily Safety Briefing (DSB)		
Communicate/Follow Up: Rounding & DSB		
Direct Dialogue (Compliment, Coach)		
<b>WEEKLY</b>		
1 Thank You Note to Home & Recognition Tool Kit (minimum)		
Forward One Suggested Thank You for VP/CEO to send		
Honor Sacred/Vital Time		
<b>BI-WEEKLY</b>		
Payroll		
Update/Communicate Scorecard/Metrics		
<b>MONTHLY</b>		
Monthly Accountability Meeting		
Financial Operational Assessments by XX day of month		
Departmental Staff Meeting (start at Comm. Board)		
Update Communication Boards		
Scheduling		
Nomination for Monthly Employee Award		
<b>PRN</b>		
Direct Dialogue (Correction)		
Employee-engaged, behavior-based selection/onboarding		
30 Day Meetings &/or 90-Day Evaluations-New Hires		
Implement Approved Suggestion: Employee Suggestion Program		
Provide Training to Peers (leaders as teachers)		
Word of Mouth/Community Connections (promotion/marketing)		
<b>QUARTERLY</b>		
90-Day Goal/PDSA Action Plans (Jan 1/April 1/July 1/Oct 1)		
Celebrate goal progress/wins		
Attend Leadership Training & Complete Road Map		
Promote attendance at Employee Forums		
<b>BI-ANNUALLY</b>		
Promote attendance at Employee Training Events		
<b>ANNUALLY</b>		
Annual Employee Performance Evaluations		
Annual Goal Development		
Fiscal Year Budget – Per Budget Schedule		
Attend Employee Service Awards		
Participate in Annual Healthcare Week Celebration		
Mid-Year Performance Conversations		
Employee Engagement Survey Promotion & Follow Up Actions		
Mandatory Education		
Participation in 1 Community Board or Major Community Event		

# Adoption ...



# HARDWIRED LEADERSHIP BUNDLE...

**The tasks & tactics in the leadership bundle are not extra work, they are how we do our work as leaders.**

# HARDWIRED LEADERSHIP BUNDLE...

**Leadership Development –  
elevating competence,  
confidence & consistency**

**.....It's a process, not an event**




## New Leader Onboarding Program



### PART I: First 5 Days

- ☐ “Make Day 1 Special” (per organization’s practice)
- ☐ 1<sup>st</sup> 5 Days Checklist (see example)




### PART II: First Month

- ☐ Initiate Leadership Mentor Relationship
- ☐ 1:1 Leader-to-Leader Meetings
  - ☐ HR
  - ☐ VP
  - ☐ CEO
  - ☐ Top 3-5 Departments that your specific department interacts with
- ☐ Organization-Wide New Employee Orientation



### PART III: First 1-6 Months

- ☐ New Leader Learning Series – Video & Classroom Learning (see example)
- ☐ “JUST START” Package:
  - Grateful Leadership - <https://vimeo.com/402277515>
  - Setting & Elevating Standards (Behavior/Pos. Comm./Job Functions, Intro to Validation-Feedback/Direct Dialogue) - <https://vimeo.com/411140664>
  - Work Relationships that Work/Rounding - <https://vimeo.com/331872605>
- ☐ 30/60/90 Day Rounding with direct supervisor
- ☐ Probationary Evaluation



### PART IV: First 6-18 Months

- ☐ Continued Leadership Training – CapstoneEDU eLearning Courses



### ONGOING:

- ☐ Quarterly Leadership Training
- ☐ Monthly Accountability Meeting Check-Ins/Mentoring

# Personalized Plan

<b>PART IV: 6-18 Months</b>	Continued Leadership Training – CapstoneEDU eLearning Courses Course 1: _____ Course 2: _____ Course 3: _____ Course 4: _____ Course 5: _____ Course 6: _____ Course 7: _____ Course 8: _____ Course 9: _____	
<b>ONGOING</b>	Quarterly Leadership Training	
	Monthly Accountability Meetings	

New Leader Onboarding Plan				
	Activity	Due Date	✓	Comments
<b>PART I: First 5 Days</b>	First Days Checklist Completed			
<b>PART II: First Month</b>	Initiate Leadership Mentor Relationship			
	1:1 Leader-to-Leader Meetings <ul style="list-style-type: none"> <li>• HR, VP, CEO</li> <li>• 3-5 Key Departments/People</li> </ul>			
	Organization-Wide New Employee Orientation			
<b>PART III: 1-6 Months</b>	New Leader Learning Series – Video & Classroom Learning - DAY 1			
	New Leader Learning Series – Video & Classroom Learning - DAY 2			
	New Leader Learning Series – Video & Classroom Learning - DAY 3			
	“Just Start” Package			
	30 Day Rounding with direct supervisor			
	60 Day Rounding with direct supervisor			
	90 Day Rounding with direct supervisor			
	Probationary Period Evaluation			

# Part I: First 5 Days

## **PART I: First 5 Days**

- ☐ “Make Day 1 Special” (per organization’s practice)
- ☐ 1<sup>st</sup> 5 Days Checklist (see example)

# Sample First Days Checklist

## Part I: First 5 Days

Employee Name: \_\_\_\_\_

Department \_\_\_\_\_

The First Days Checklist	Date Completed	Employee's Initials	Trainer's Initials
<b>DAY 1</b>			
Infectious Disease and Exposure Control Module/Test			
Hazardous Materials Awareness Module/Test & Access to MSDS.			
Personal Protective Equipment (PPE) Module/Test			
Emergency Management Program Module/Test			
Abuse and Neglect Module/Test			
Fire and Safety Training Module/Test			
Review HR Module/Test: zero tolerance of alcohol & drugs, zero tolerance for harassment, employee's responsibility to maintain licensure/certificate, employee occurrence reporting, Patient & Residents Rights			
Review Work Rules & Regulations, Behavior Standards, Code of Ethics, Values			
Review of Infection Control Policies.			
Review HIPAA Policy.			
Proper Lifting Techniques and Transfers, other departmental safety requirements.			
<b>DAYS 2-5</b>			
Review of Department Specific Policy / Procedure Manual Process for scheduling time off work, calling in sick, scheduled breaks			
Review of Communication Standards/Plan – Module/Test			
Review of Administrative Policy / Procedure Manual			
Review Occupational Health Policies - Employee responsibility to complete OHS paperwork and medical testing, if not completed at time of hire and annual TB testing, reporting of injuries, etc.			
Review Chain of Command and Communication Policy.			
Review of Payroll Policy – Train on the time clocks. Work Schedules /Shift Rotation/ Shift Differentials/Overtime Policy			
Review job status / Explain FTE status			
Orientation Period "At-Will" first 90 days. 30-Day & 90-Day Check Ins & 90-day evaluation, mid-year conversations, anniversary annual evaluation process.			
Basic Rules: Dress Code, Smoke Free Campus, Parking			

1<sup>st</sup> Day of Work: \_\_\_\_\_ Due date: \_\_\_\_\_ Date Submitted to Human Resources: \_\_\_\_\_

# Part II: First Month

## **PART II: First Month**

- ☐ Initiate Leadership Mentor Relationship
- ☐ 1:1 Leader-to-Leader Meetings
  - ☐ HR
  - ☐ VP
  - ☐ CEO
  - ☐ Top 3-5 Departments that your specific department interacts with
- ☐ Organization-Wide New Employee Orientation

# Part III: First 1-6 Months

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- ☐ Probationary Evaluation

# New Leader Learning Series

## VIDEO ASSIGNMENTS – Videos to be watched prior to Day 2 of Classroom Orientation

\*Work Relationships that Work/Rounding - <https://vimeo.com/331872605>

Leading Change - <https://vimeo.com/407671491>

\*Selection & Onboarding - <https://vimeo.com/417699943>

Quality, Safety, High Reliability Fundamentals - <https://vimeo.com/392861967>

## DAY 2: CLASSROOM LEADER ORIENTATION – 8a to 1p

TIME	TOPIC	Internal Champion(s)
8:00-10:00	Human Resources Policies & Practices: Probationary Period, 30, 60, & 90 Days	Human Resources

## VIDEO ASSIGNMENTS – Videos to be watched prior to Day 3 of Classroom Orientation

Finance, Growth, & Staffing - <https://vimeo.com/390954170>

Resiliency - <https://vimeo.com/400690468>

Your Leadership Career – “Bestie to Boss” - <https://vimeo.com/396551768>

## DAY 3: CLASSROOM LEADER ORIENTATION – 8a to 12:30p

TIME	TOPIC	Internal Champion(s)
8:00 – 9:15	Financial Management Monthly P&L/Variance Analysis, Annual Budgets, Productivity Reports Finance Team Overview & “How leaders can support the team”	CFO, Finance Team Leader
9:15-10:15	Computer/IT/Software/Calendar/Task Management System	Department Leader(s), Administrative Secretaries
10:15-10:30	BREAK	
10:30-11:15	Involvement in the community; Word-of-Mouth program, Community Team Overview & “How leaders can support the team”	Community Relations Director, Community Team Leader
11:15-12:30	LUNCH with Panel Q&A Session – VIDEO ORIENTATION	Leader Panel

POSSIBLE CLASSROOM ORIENTATION ADDITIONS (organization-specific):

- o Project Management Process/Tools
- o Lean

## PART III: First 1-6 Months - New Leader Learning Series

### VIDEO ASSIGNMENTS – Videos to be watched prior to Day 1 of Classroom Orientation

\*Goal Cycle - <https://vimeo.com/420432163>

\*Grateful Leadership - <https://vimeo.com/402277515>

\*Setting & Elevating Standards (Behavior/Pos. Comm./Job Functions, Intro to Validation-Feedback/Direct Dialogue) - <https://vimeo.com/411140664>

\*Communication Plans - <https://vimeo.com/360009443/3f363df7f4>

Service Fundamentals - <https://vimeo.com/389373298>

(NURSING ONLY) Validating the Nursing Bundle - <https://vimeo.com/399269523/4eaf1bf1de>

### DAY 1: CLASSROOM LEADER ORIENTATION – 8a to 1p (Nursing Leaders 8a-3p)

TIME	TOPIC	Internal Champion(s)
8:00-9:00	Mission/Vision/Values & Organization/Dept Goals Leadership Bundle/Responsibilities Checklist Overview Journey/Initiative Overview (Team Structure, etc.) Monthly Accountability Meetings, Communication Boards/Plans	CEO & Initiative Champion
9:00-10:15	Behavior Standards, Work Rules/Disciplinary Process, Employee Recognition Program(s), Employee Satisfaction Survey Process, Employee Townhall Meetings/Forums, Employee Training Events, Employee Experience Team & Employee Training Team Overview & “How leaders can support the teams”	HR Leader & Employee Experience & Employee Training Team Leader
10:15-10:30	BREAK	
10:30-12:00	Patient Satisfaction/Experience Surveys – Questions & Process, The Data Positive Communication Standards Service Recovery Program Patient Experience Team Overview & “How leaders can support the team” Patient/Family Advisory Council Overview Grateful Patient Program	Patient Experience Team Leader;
12:00-1:00	LUNCH with Panel Q&A Session – VIDEO ORIENTATION	Leader Panel
1:00-3:00	<b>Nursing Leaders Only:</b> Nursing Bundle Overview; Nursing/Clinical Team Overview & “How leaders can support the team”; annual competencies/skills stations	CNO, Nursing Team Leader

\*Or, complete Level 1 of this course in CapstoneEDU

# New Leader Learning Series

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# Part IV: First 6-18 Months

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- Continued Leadership Training – CapstoneEDU eLearning Courses

### PART IV: First 6-18 Months

#### Continued New Leader Training – CapstoneEDU eLearning Courses

CapstoneEDU Course Assignments	ORDER of COMPLETION	Due Dates
Goal Cycle		
Grateful Leadership		
Work Relationships that Work (Rounding)		
Selection & Onboarding		
Communication Plan		
Direct Dialogue (Informal and Formal Feedback)		
Setting & Achieving High Standards		
Resiliency		
Changing How We Change		

# Resources

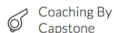
CapstoneEDU Course Catalog x +

capstoneedu.capstoneleadership.net

## CAPSTONEEDU CATALOG

### DIRECT DIALOGUE QUEST

By: Capstone



Coaching By  
Capstone



Community Support



10 Levels

Could you imagine the coach of a championship team not providing feedback to the players? You would likely agree that frequent high quality feedback is required for individuals and teams to reach peak performance.

Performance feedback from a leader is truly just a conversation, or a series of conversations. Even though leaders have a lifetime of experience in conversing, it is with regular frequency that leaders reach out to us for advice on what to say to their employees.

As well, you don't have to be a leader for very long to...

[CHECK IT OUT](#)



**WORK RELATIONSHIPS  
THAT WORK**

# Ongoing

## **ONGOING:**

- ☐ Quarterly Leadership Training
- ☐ Monthly Accountability Meeting Check-Ins/Mentoring

## Monthly Leader Accountability Meeting Agenda

### Leader brings to meeting:

- ☐ Leadership Training Road Map
- ☐ Scorecard: Progress/Results
- ☐ Satisfaction Scores
- ☐ Rounding Log & Stoplight Report
- ☐ 90-Day Action Plans and PDSA(s)
- ☐ Financial Operational Assessment
- ☐ Monthly staff meeting agenda/notes
- ☐ Thank You and Community Logs

### ☐ Organizational Goal Updates

### ☐ Department Goal Updates (action plans & measurements)

#### FINANCE

- ☐ Monthly & YTD Operational Assessment (compare to budget and to last year)

#### PEOPLE

- ☐ Rounding Log: \_\_\_\_\_ Documented Roundings
- ☐ Stop Light Report Review
- ☐ Thank You Note Log: \_\_\_\_\_ Thank You Notes Sent
- ☐ Reward & Recognition for individual/team efforts in department completed
- ☐ 30-day conversations & 90-day eval/conversations: \_\_\_\_\_ % Complete
- ☐ Communication Board up-to-date
- ☐ Staff Meetings – staff meeting agenda/notes; staff attendance trends
- ☐ Annual Performance Evaluations Status Update (when applicable)
- ☐ Annual Mid Year Performance Conversations Status Update (when applicable)
- ☐ Direct Dialogue (Compliment, Coaching Convos)
- ☐ Low Performance Work Plan(s)/Correction Convos Follow Up Report

#### SERVICE

- ☐ Patient Satisfaction – scores/comments/trends reviewed
- ☐ Hourly Rounding hardwired: \_\_\_\_\_ Avg. Call Light Volume/Shift
- ☐ Discharge Phone Calls to Home hardwired: \_\_\_\_\_ Percent Complete
- ☐ Validation (Patient) Rounding hardwired: \_\_\_\_\_ Percent Complete
- ☐ Support Department Satisfaction Trends/Action Plan

#### QUALITY

- ☐ Quality/Safety/Licensing/Accreditation/Regulatory Updates  
(Sentinel Event Alerts, NPSGs, Tracers/Audits, FMEA, etc.)
- ☐ Update on PDSA(s), Daily Safety Briefings, and other improvement efforts

#### GROWTH

- ☐ Volumes compared to last year and budget
- ☐ Revenues compared to last year and budget

#### COMMUNITY

- ☐ Leader/Department Involvement in Community
- ☐ Community Involvement (volunteers, etc.) in Department

## New Leader Onboarding Program

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- ☐ “Make Day 1 Special” (per organization’s practice)
- ☐ 1<sup>st</sup> 5 Days Checklist (see example)

### PART II: First Month

- ☐ Initiate Leadership Mentor Relationship
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### PART IV: First 6-18 Months

- ☐ Continued Leadership Training – CapstoneEDU eLearning Courses

### ONGOING:

- ☐ Quarterly Leadership Training
- ☐ Monthly Accountability Meeting Check-Ins/Mentoring

# Personalizing New Leader Onboarding

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<b>ONGOING</b>	Quarterly Leadership Training	
	Monthly Accountability Meetings	

New Leader Onboarding Plan				
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	Organization-Wide New Employee Orientation			
<b>PART III: 1-6 Months</b>	New Leader Learning Series – Video & Classroom Learning - DAY 1			
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	60 Day Rounding with direct supervisor			
	90 Day Rounding with direct supervisor			
	Probationary Period Evaluation			

# Optimizing Your New Leader Onboarding Program

## **Study/Adjust – Refresh/Re-inspire)**

- Re-visit objectives
- Re-visit content (as leadership bundle or specific tactics changes)
- Re-visit process (virtual, individual, group, etc. and timing)
- Re-visit who attends (e.g., succession planning, career exploration)
- Re-visit instructors/mentors/contributors

# Just START!

1. What are you doing now and how well are you doing it?

Strengths, Weaknesses, Opportunities

2. “CASE” these resources to address any identified Weaknesses, Opportunities (...make it yours, make it better!)
3. Define required management tasks and leadership tactics
4. Find (build up) “internal champions”/”subject matter experts”



# New Leader eBoot Camp

Training & Coaching program designed for New Leaders

Approximate completion time is 6 months

On-demand eLearning

1:1 personalized coaching with Jane & Sue

LEARN MORE HERE: <http://bit.ly/Capstone-eLearning>

# QUESTIONS?

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CONTACT US!

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