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High-level Training Needs Assessment

Sample

Prepared by:
Ruth Kustoff, Principal
Knowledge Advantage, LLC

<http://www.knowledgeadvantage.biz>

rkustoff@knowledgeadvantage.biz

860.256.7879

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Background

This training needs assessment is a high-level review of the current business environment at Company A with a goal of analyzing learning and training needs to meet business objectives. Company A is a home health care provider.

This analysis was completed through one-to-one conversations with select individuals from a cross section of business units within Company A. Though the specific learning and development needs of Provider Ops and clinical areas within Company A were examined, individuals from operations and IT were also interviewed for a comprehensive picture of learning and delivery and business needs. A total of 12 interviews were conducted.

Summary – The Environment

Company A is currently in a state of intense change because of a new CEO and senior management team. This has created a culture shift that includes:

- a more team oriented working approach,
- a higher expectation of staff accountability,
- greater communication from senior management, and
- a stronger focus on delivering high quality customer care.

Additionally, the value of a well trained workforce has been recognized, and a newly formed training department is now part of HR.

Company A has been functioning as a silo based organization. There is recognition of the need to break down silos and improve cross functional team and organizational communication. This way, teams would share information with each other to lessen duplication of efforts or misunderstandings of information shared with external Providers or customers.

There have been lots of changes at Company A in the way things get done. Some of the rules have changed and staff may not be aware of the changes and therefore not know how to respond to an internal situation or a question from an external contact. In order to support these changes there needs to be regular communication that disseminates throughout the organization at all levels.

As part of these changes, and as Company A continues to grow, many individuals need to be involved in problem solving to ensure alignment of solutions and clarity of information. A challenge during this time of re-evaluation and change is ensuring all the right players are involved in such decision making and are able to provide input without requiring attendance at countless meetings.

To support these conversations and ensure each meeting is focused, targeted and directed to the identified issues, an exploration of problem-solving and decision-making strategies could be explored. A broad organization-wide approach to working through challenges and making decisions would lessen meeting time, more clearly identify what players need to be part of which meeting, and help to reach resolution more quickly. There are many techniques to research, with the goal of adapting one approach that can become standard across Company A.

Organizational Priorities

Provider Ops Training

Provider Ops is the face, and backbone of Company A. The contracting and maintenance of Providers is a key business requirement. As a result, it is very important that Provider Ops staff are fully trained on their job function and the internal processes a Provider may go through at Company A.

Current State:

- There is a lack of consistency across Company A when communicating with Providers.
- Although the Provider is given a phone number to call for issues or questions, they often will call Provider Ops because they have a direct number to their coordinator.
- Provider training is completed with the Network Coordinator walking the Provider through a two-hour PowerPoint via WebEx. This is a long, arduous process for both the coordinator and the Provider and it's not getting needed results. There is no assessment of the learning or measurement to be sure the Provider understands the presented information.

Needs:

Within Provider Ops there's opportunity to make improvements and to lessen abrasion points. Some areas are listed below:

- improve interaction and rapport with Providers
- improve how Providers see Company A through:
 - better customer service
 - paying claims correctly
 - faster issue resolution

Other training needs include data analytics to evaluate market need to ensure in-network Providers, and sales training for completing outbound calls to secure new Providers.

There needs to be a standard process across the company on how to communicate with Providers and the information given to them.

Recommendations:

1. Develop Job Aids or a coordinator workbook that outlines "do's and don'ts and FAQ's around how to talk with Providers. A standardized script should be used (with flexibility) when communicating with Providers. It should be shared across all functional areas to ensure information alignment.
2. To support the coordinator's role in outbound sales, identify and research existing phone sales training programs that would give coordinators a foundation in how to present themselves and Company A to prospective Providers and how to get them to sign a contract.
3. To lessen coordinators' time in training Providers, so they have time to complete other tasks such as -- sales calls, and data analytics and running reports -- a customized self-directed

elearning program for Providers could be developed. Once contracted with Company A, Providers would be required to complete the training within a specified time period. Included in the program would be self knowledge checks and a final assessment to show mastery. Coordinators would be responsible to ensure Providers are completing the training by monitoring course completion status. Following the training, the Provider and Network Coordinator would meet to discuss content, address outstanding questions and review the final assessment.

In order to determine if this training is a viable option, a statistically valid sample of Providers should be surveyed to get their input on what is or isn't working for them around their training and how responsive they would be to such a program. **Knowledge Advantage** can create a survey, if needed.

Clinical Needs of the Business

A standardized training approach for all nurses is required to support the clinical direction of Company A and to ensure it is safe, accurate and compliant.

It is important that all Company A nurses know and understand what they are doing, and when and who to talk to, if they have questions. Currently, nurses aren't confident in their abilities because they do a lot of different things and their role is under review and may be redefined, requiring a deeper skill set. Until nurses are confident in their knowledge and skills, existing programs can't be expanded and new programs can't be developed.

It is necessary that every nurse in the company has the same training and understanding of how to do their job. Without this standardization there is too much variability which makes work output inefficient.

Current State:

- The UM nurse receives a one week overview training. Following this, the nurse is on the floor shadow training. There's not a lot in depth UM training.
- For nurses in Product B, there is a two-week training that covers organizational culture, confidentiality, and technical applications. Once on the floor, there are two team leads that provide side-by-side mentoring. Additionally there is a checklist of key elements of what they need to know, and by week 3 or 4 the new nurse gets a caseload. It takes a nurse between 4 and 6 months to be fully on-boarded and ready to handle a caseload of 60 – 70 patients.

Needs:

Clinical training needs are not currently being met. Nurses are managing to learn the basics for their job. However, there is a lack of standardization across functions which need to be met in order to ensure reliability and consistency of results. Some current gaps are:

- Nurses need to understand the business better, each line of business and what they mean
- Overview of Medicare, Medicaid and commercial
- More in depth and scheduled system training
- Improve training for Product B nurses by lessening its length so nurses get up-to-speed faster
- Provide courses / programs that meet nurse continuing education requirements
- Ensure nurses are kept informed of changes and new trends in medicine to remain up-to-date

Recommendations:

1. Improve training process and structure a foundation – a benchmark of requirements – so nurses can identify how they learn best, and in what areas they need support and direction.
2. Develop individual continuing education plans with nurses to identify what requirements they must meet to maintain certification and to meet state licensure requirements.
3. Research available online UM training courses to provide foundational learning to nurses.
4. Create informal learning opportunities that promote inter-team learning and sharing through online discussions, lunch and learn, while building on existing Case Rounds sessions.
5. Explore available training courses through government agencies on Medicare and Medicaid special plans.
6. Identify a standardized onboarding curriculum for all Company A nurses, including requirements for specialty areas. Design and develop an elearning program to support new hire needs.

Other Areas of Improvement

- There is a lack, organization-wide of standard processes around quality control of work output. There is no measurement in place to evaluate Company A as an organization or to gauge employee performance and provide constructive feedback. Similarly, current training programs have not included a pre and post assessment to determine if learning was gained and if performance outcomes improved.
- Another area of standardization that could support productivity and informational sharing is the identification of a singular approach and process across teams and functions around project management.

- **Knowledge Advantage** can support functional areas across the organization, by creating a checklist or template to identify needs and gaps and where a functional area may need support. This would build a standardized approach to evaluate needs at a granular level organization-wide and an opportunity to partner with internal clients.
- When assessing training requirements by functional area, a determination will be made if training programs should be developed in-house or if an existing course / program can be purchased. As the training department becomes more focused on developing courses, a standard process of design, development and delivery of training should be created. It would outline a methodology of design (ADDIE) and determine what success looks like and how to measure it.
- Meeting with each of the trainers / designers in the training department to create a professional development plan is important to support individual growth and for the team to successfully serve internal clients. Providing professional development through online learning or program attendance would help them in becoming designers and developers, in addition to receiving coaching and mentoring.
- Though customer care is at the core of what Company A does, those on the front end of Company A may not be meeting expectations. A company-wide communication and education campaign should be developed that outlines the importance of customer care. It would identify what constitutes quality customer care and document the behaviors and characteristics of what it is, and how to monitor its use.

Long-term Recommendations

Recruitment Process - There is recognition for a defined recruitment process that identifies candidates with the skills and personal characteristics required for every job function. This dovetails with training to ensure new hires, and current staff (as job requirements change staff need access to ongoing training) are able to meet the demands of their job function and have performance success.

Job Competencies – In conjunction with HR, create performance guidelines and metrics for each job function. Documentation of job functionality, competencies and core characteristics needed to meet the needs of the job will support training needs identification and performance evaluation.

Improve Communication – Identify why and where the bottleneck is, that communication from senior management doesn't flow completely down and across the entire organization. Educate managers and

staff of the importance of two-way communication and create vehicles to encourage sharing of information through online means or face-to-face forums.

Promote Training Success Stories - To support the training function and to begin to educate individuals and functional areas of the value of learning and development, regular stories about what training has been developed and delivered and how it either solved a problem or improved a process, will begin to educate everyone of how continuous learning and targeted training can impact one's performance and support the goals of the organization.

Use of technology – There are many ways technology could be used to foster staff development, including self-directed elearning for baseline and foundational learning to online learning communities to organizational wikis, with a goal toward opportunities for self-paced learning through a catalog of courses designed to support individuals in their career development and advancement.

Next Steps

This high-level assessment touches upon the training needs of Provider Ops and clinical staff. Additional research that identifies individual needs and documents what changes or improvements are required, and how training will impact a job and functional area, will support training design and delivery.

Based on this assessment, quick wins can be reached by creating and implementing some of the suggested changes to see early returns of improved communication and job performance.