

# Onboarding Process Improvement, Batch Processing Story Board

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## Team Members:

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## Plan

Identify an opportunity and Plan for Improvement

### 1. Getting Started

The Philadelphia Department of Public Health Human Resources Office (PDPH HRO) Onboarding Process Improvement project was initiated in April 2016 to reduce the amount of time and paper used for new employee appointment processing. To make these reductions, new employees were provided with required documents and able to view the PDPH Confidentiality Training in advance of appointment processing through use of a Google Drive site. To determine the impact of using Google Drive, the amount of time PDPH HRO staff spent at appointment processing and how much paper was given to each new hire was measured between June and September 2016. After this time period, data showed that paper consumption was reduced by 88.2% and the median time per new hire appointment was reduced by 8.8%. Based on this data, PDPH HRO staff suggested that the current approach to appointment processing be reexamined to identify potential solutions and theories to further reduce time. In November 2016, the Onboarding Process Improvement project team restarted the Plan-Do-Check-Act cycle to address the amount of time dedicated to the onboarding of fulltime PDPH new hires.

### 2. Assemble the Team

The Onboarding Process Improvement project team included PDPH HRO staff from various levels. Staff included the HRO Director, the Hiring and Staffing team, Transactions team, and support staff. The PDPH Performance Management Unit (PMU) facilitated meetings with the team to create a plan to understand the problem, develop project goals and objectives, and determine measures of success.

### 3. Examine the Current Approach

To process a fulltime PDPH new hire, individual appointments were scheduled with a Clerk 3 at the PDPH HR Office prior to their start date. These appointments were 63 minutes long (median) and accounted for 653 minutes per month (mean). To gain consensus on factors as to why these appointments were lengthy and possible solutions to the problem, Multivoting (i.e., Nominal Group Technique) was utilized. The following list of factors was generated:

- Not enough staff
- Questions and answers
- Paperwork explanations and corrections
- Communication between Hiring and Staffing and Transactions Units
- Out of date processes
- Candidate ill-prepared (e.g., did not bring proper identification)

Individual, anonymous voting determined that the team considered "out of date processes" as the main reason why new hire appointments were too lengthy.

### 4. Identify Potential Solutions

To reduce time dedicated to the onboarding of new hires, the team generated the following list of solutions:

- Batch processing (i.e., group orientation)
- Add necessary information to the notice of transaction between the Hiring and Staffing and Transactions Unit (i.e., DOB, driver's license, SSN)

Individual, anonymous voting determined that the team considered "batch processing" the best solution to test in this PDCA cycle.

### 5. Develop an Improvement Theory

Group processing appointments, or batch processing, will reduce mean time (in minutes) dedicated to the onboarding of fulltime PDPH new hires, which includes rehires and reinstatements, by 33% from 653 minutes per month to 438 minutes per month by October 1, 2017.

## Do

Test the Theory for Improvement

### 6. Test the Theory

Prior to testing the theory for improvement, preparation steps were taken including determining the HR staff roles and responsibilities, mapping out the new process, and creating a presentation. The presentation was a collaborative effort among all project team members. Multiple iterations were created and reviewed prior to launching batch processing. Beginning July 17, 2017, all new employees were onboarded on their start date at a group orientation. These new hire orientations were held every other Monday at 9am. This coincides with the start of each payroll period and a new hire's start date.

## Study

Use Data to Study Results of the Test

### 7. Study the Results

To measure the impact of batch processing, data was collected from July 17, 2017 through September 25, 2017. During this time, six orientations were held. The mean monthly staffing time (in minutes) dedicated to the onboarding of fulltime PDPH new hires was **reduced by 65% from 653 minutes per month to 226 minutes per month.**

In addition to measuring improvements to time, customer satisfaction with the new process was assessed through an online survey. Respondents either strongly agreed or agreed that the content presented at the orientation was both relevant and valuable, that questions were satisfactorily answered during orientation, and overall felt very comfortable or comfortable with the orientation.

In addition to the time measurement, there were several other benefits of batch processing identified during the test phase. Batch processing provided new fulltime hires an opportunity to interact with PDPH HRO Human Resources Professional and gave new hires information about PDPH and city-wide policies, how PDPH is structured, benefits information, and how to access additional resources. Previous to implementing batch processing, onboarding new fulltime hires primarily consisted of completing required paperwork, with limited opportunity to interact with PDPH HRO staff.

## Act

Standardize the Improvement and Establish Future Plans

### 8. Standardize the Improvement or Develop New Theory

A meeting was gathered to discuss the data collected and the project team's feedback on the implementation of batch processing. Based on positive feedback from the project team, the customer satisfaction survey responses, and the measured time reduction, batch processing for fulltime PDPH new hires, including rehires and reinstatements, should be fully implemented.

### 9. Establish Future Plans

New fulltime hire orientations will continue to be held on start dates with the required documents to complete and review sent in advance via Google Drive. At the completion of each fiscal year quarter, the PDPH PMU will distribute a satisfaction survey to all the new fulltime hires who were onboarded during that time. This will assist in monitoring the success of batch processing.