

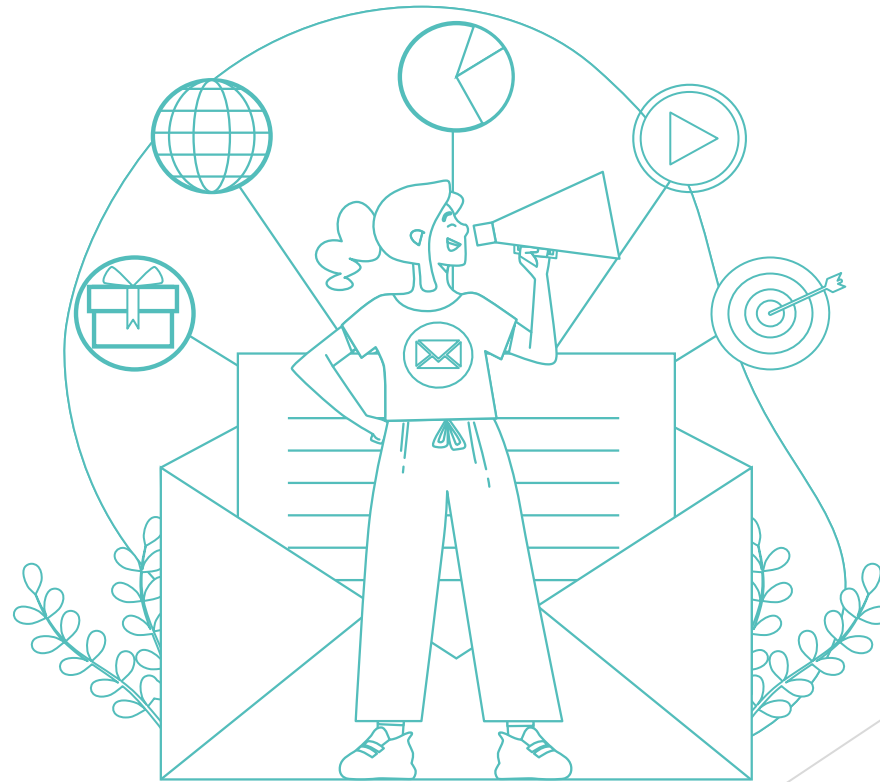
Smart Living

Onboarding with Success



Welcome & Goals

- ▶ Understand process of onboarding
- ▶ Learn how we will run the onboarding process
- ▶ Review tech onboarding tool which we will use when in process



Meet Seth



Why solid onboarding leads to success

Smooth Transition = Higher Success

When all groups feel a smooth process they adopt and buy-in better

First impressions set the tone / Solid processes keep it going

Individuals, Staff, Families, Guardians and Case Managers are likely nervous, the first discussion followed up with a good process keep the ball rolling

Consistency among agencies changes a system

When making state-wide change, consistent movement within the agencies is key

**Solid Processes of onboarding mean people feel safe
in the process and trust the change to technology
enabled supports**



The theory around our onboarding process

1. Selection of individuals and sites to begin process starts with a guess, ends with data- *key here is this may not always be correct*
2. Explain to each group each step of the process, and getting consent and buy-in with each step
3. Follow up after each step to ensure understanding
4. Follow a model of data-driven decision making and backing up data with experience
5. The team is part of the process, team includes all stakeholders in the person (site)'s circle

Key steps in the onboarding process

IDENTIFICATION OF INDIVIDUALS/SITES

This step is where we start the process, we believe they will be a good fit, but we do not fully know yet. This can be backed up with screening tools as needed.

TEAM FIRST ENGAGEMENT MTG

First meeting of the team is prior to assessment and data collection, we present the process in all steps, and ask for consent to move forward with assessment of individuals

ASSESS THE INDIVIDUAL'S NEEDS

In this step we determine the needs of the individual and what items can be solved with tech and what need in person support, both remote and AT

VALUE-STREAM MAP THE STAFF

Using value mapping tool, determine what staff are actually doing when they are working at a site

ONCE DATA IS COLLECTED IT IS ANALYZED

Remote lead and team review both the assessment and the value stream map to prepare a potential plan, at this step it may be found remote supports without staff may not be the right option

SECOND TEAM ENGAGEMENT MTG

The remote/tech plan is presented to the group, and each device is discussed. Consent is then asked to install and test technology (nothing about staffing changes at this step)

RUN TECH/REMOTE WITH PREVIOUS SUPPORTS

During this period tech/remote is in place and individuals train, remote staff act "as if" they are the only coverage, in-person staff are there as fallback (min 2 weeks)

THIRD TEAM ENGAGEMENT MTG

At this meeting the trial period is discussed and each member of the team discusses their feelings, if all feel good, consents are signed for full implementation and tech is fully implemented as support

Overcoming Barriers Through Process

Staff Hesitation

Family Skepticism

Individual Concerns

Funder/Reg Challenges



How do we know onboarding is successful

Metrics and Data: When the onboarding process is followed, the data will lead our decisions, if decisions are made on emotion or scarcity, the process is not working

Early Wins: If process is followed there should be early wins to build on success

Satisfaction Increases: The vibe will shift from trepidation in stakeholders, to excitement, and staff/individual satisfaction increases

Lets look at the onboarding process tool



Q&A and Wrap-Up

Technology = more safety, more independence, more freedom



Families remain in control of decisions



Together we can support successful transitions

Thank you!

Brian Hart

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