

Case Study: Chapter 8 - Mayo Clinic Orientation

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### **Introduction**

Mayo Clinic is a world-class non-profit healthcare organization known for its specialized treatment in cancer, heart care, transplants, and neuroscience. Mayo Clinic is committed to its three missions, which are clinical practice, education, and research. They are located around the United States with campuses in Minnesota, Arizona, Florida, Iowa, and Wisconsin. Employing over 55,000 people in the different missions at various locations creates the challenge of making sure employees' goals align with Mayo Clinic's mission and values. The case study requests a redesign of the orientation program for the staff at the Minnesota campus. Even though the Minnesota campus is the focus of the redesign, the other campuses should be considered in order to make sure that there is consistency across the board.

### **Orientation Approach**

The first question that needs to be answered is, "What approach or approaches would we recommend?" Mayo Clinic's Minnesota campus should use an organizational socialization approach when onboarding new employees. Organizational socialization is the process of a new employee learning the social knowledge and skills that are necessary to be efficient at their new job (Werner & DeSimone, 2012, p. 257). Through this approach, it is essential that Mayo Clinic covers "the four C's: compliance, clarification, culture, and connection" (Bauer, 2007, p. 2). Compliance ensures that their new employees are equipped with information in regards to policy-related rules and regulations. Mayo Clinic also needs to bring clarity to new employees in their roles and define expectations and provide their new employees with an understanding of the culture that defines who they are. This has to be done both at the organizational and the departmental level. Last but not least, Mayo Clinic needs to connect with their new employees

and establish a relationship with them so that they know they are an integral part of the mission of Mayo Clinic.

The best way to demonstrate the four C's is through a structured onboarding process known as formal onboarding. Within the onboarding process is orientation. This is also known as the encounter phase of onboarding as this is when the new employee gets to compare their expectations to the actual job. In order to provide the four C's to the new employee, the orientation process should take place in four phases: pre-arrival, organizational orientation, department orientation, and post-orientation.

The first phase, pre-arrival, focuses on creating a warm, welcoming environment for the new employees prior to their first day. This can be done through contacting the new employee through phone or email. Organizational orientation focuses on providing an overview of the company on the new employee's first day. This orientation should be facilitated directly by the Office of Human Resources with the assistance of key players such as Payroll, Security, and Occupational Health (Mitchell & Gamlem, 2012, p. 84). The purpose of the organizational orientation is to affirm the new employee's decision to join the company and make them feel like a contributing member to the company (Arthur, 2012, p. 297). This orientation should be in person in order to help provide evidence of a friendly and supportive work environment.

Following the organizational orientation, new employees should head to their department for an informal orientation with their supervisor (Armstrong & Mitchell, 2008, p. 45). During this orientation, a new employee should receive information that directly relates to their role and the mission that they fall under: clinical practice, education, or research. Supervisors should coordinate the departmental-based orientation with the organizational orientation to ensure how the department aligns with the organization's mission. Human Resources should provide each

supervisor with training and a toolkit that assists them as they orient their new employee. In the toolkit, there should be information on what steps should be covered during the new employee's department orientation.

The fourth phase, post-orientation, focuses on evaluations from both the new employee and their supervisor in regards to the orientation process. The evaluations should allow the HRD department to evaluate the information that is being provided through both orientations. This is also a time when new employees can plan meetings with a representative from Human Resources, their supervisor, and coworkers to address questions. It is important for the new employee to experience frequent contact with all three groups as they continue to transition (Werner & DeSimone, 2012, p. 276).

### **Providing Fundamentals**

The second question the case study asked was, "What information or contact do you think is most critical to convey during orientation?" Before orientation, the new employee should receive orientation information in an email from the Human Resources Department. This email should provide the date, time, and location of the organizational orientation that will take place on their first day of employment. The email should also provide a link to Mayo Clinic's career page, which provides information about documents required on their first day, a brief description of what to expect during orientation, and contact information in case they have further questions. This provides a sense of ease for the new employee as they can plan ahead for what is expected for their first day. We would advise that the Human Resources Department send these emails to new employees at least a week in advance of their start date. In addition, supervisors are encouraged to send their new employees an email or call them as a way of sharing their excitement for their new addition to their team (Armstrong & Mitchell, 2008, p. 47).

During the organizational orientation, it is important for the presenters to share Mayo Clinic's values, culture, missions, and policy to their new employees. It is also important to share any information that may be specific to the Minnesota campus that is different than the other campuses. Presenters may also share the history of Mayo Clinic and how its values originated with Dr. Mayo and his sons and continue on today. It is encouraged to share photos of Mayo Clinic executives during this time so that the new employees have an opportunity to familiarize themselves with names and faces of the heads at Mayo. In order to provide enough detailed information, the Office of Human Resources should create an onboarding packet that includes employee work information, such as work email and username, orientation checklist, maps, employee benefit plans, and other information that can assist the new employee through the onboarding process (Bauer, 2010, p. 10). This information should also be posted on Mayo Clinic's intranet site.

During the presentation segment of the orientation, a representative from Human Resources should cover in more detail the documents in the orientation packet. Documents such as the employee benefit plans and time off policies. This is also a great time to promote any programs that would be beneficial to the employees such as a rewards and recognition program or a wellness program. Bringing attention to these programs increases the employee's thoughts of retention in the company as he or she will see how the company cares about them more than just through compensation.

In conclusion of the organization orientation, a representative should also assist new employees in reviewing the checklist in their packet and information on how to navigate to their department and other main offices within the campus.

During department orientation, it is important for the new employee to meet with their supervisor and engage in conversation about how they are important to the team's purpose within Mayo Clinic. The supervisor can then discuss how the new employee can help the team fulfill their purpose through their roles and responsibilities. This is also a time for the supervisor to inform the new employee about compensation procedures such as pay periods, timesheets, and performance management. Following the discussion should be a chance for the new employee to meet the team and any other employees they will be in contact with. The reason that we suggest this orientation to be informal is to allow flexibility for both the supervisor and the new employee to connect with one another at their own pace.

In addition to the supervisor, the new employee should be assigned a buddy. A buddy is a co-worker that has been working at Mayo Clinic for longer than a year and represents the organization's values. The buddy can assist the manager in facilitating the new employee's department orientation. For example, the buddy could guide the new employee around the department to show them where their new office is located and how to navigate to common spaces. Spaces that should be covered are their teammates' offices, conferences rooms, supplies room, break room, copy machine, bathrooms, and the way to the nearest emergency exit.

### **Training Methods**

The third question that was proposed was, "What types of training methods or activities would you recommend?" The orientation process is crucial to the employee's retention at the company. Therefore, the orientation's training and activities should be designed to meet every possible need (Werner & DeSimone, 2012, p. 273). At the organization orientation, they should take advantage of the large group of new employees by providing them with a unique opportunity to build relationships through an icebreaker to get to know one another. This can be

done by allowing each new employee to introduce themselves to the group by sharing their name, job title, and the department they will be working in. This is also a chance to hand out Mayo Clinic prizes to employees through asking them questions after watching the video about the history of Mayo Clinic.

Following the organization orientation will be the department orientation. This is a great time for the employee to learn from their supervisor about the department's policies and employee training opportunities. This is typically the time that a new employee will go through training specific to their job title. Some of the training might be taken online, while others may be in a classroom setting or on-the-job training.

In addition, Mayo Clinic should consider implementing a Learning Management System (LMS) as the portal for basic training. Basic training are the courses that the majority of employees should be required to take such as policies, Fraud Waste and Abuse, Bloodborne Pathogens, HIPAA, and others basics. This should verify that all Mayo Clinic employees are receiving the same information. The benefits of a LMS is that it can be used for monitoring of completion of courses and incomplete courses.

In order to cover all areas within Mayo Clinic, it is recommended that the HRD department should create a board that oversees the training of employees. This board will include representatives from each mission: clinical, education, and research, and from departments like Human Resources and Compliance. Other representatives, such as I.T., would also be a valuable asset to the board. Creating this board will allow Mayo Clinic to design training paths that are specific to a job title and mission. For example, a new front desk employee who will be working in the clinics will need training on customer service and the online patient database in addition to the basic trainings. The board should decide whether these specialized courses should be taken

online or in person. The benefit of the trainings being placed online is that the information can be completed at each employee's individual pace. This would give the employee some control over their orientation process, which could keep them from being overloaded with information.

### **Length of Orientation**

The final question asked was, "How long do you think the orientation program should last?" Overall, the onboarding process should make up the first 90 days of the new employee's career at Mayo Clinic. The first week would focus on the two orientations mentioned earlier. The remainder of their first week will focus on continuing the department orientation. This allows flexibility to the new employee and supervisor. At the end of the first week, the new employee will receive a request to complete a survey where they will evaluate their experience between day of accepting the position through their first week. This will allow the HRD department to determine where the gaps are in the orientation process.

At the end of the month, both the supervisor and new employee will receive a request to complete a survey (Mitchell & Gamlem, 2012, p. 86). The supervisor's survey will focus on rating their new employee's fit to the job and the team, while also asking the supervisor if they felt prepared to orient their new employee and if there were any resources they wish they had during the process. The employee's survey would help the HRD department evaluate the supervisor's role in onboarding their new employee. The results will help the HRD department see the gaps they have in training and assisting supervisors with onboarding new employees.

Supervisors are encouraged to continue the onboarding process following the first week by setting up regular meetings throughout the remaining onboarding process as it will help increase the employee's engagement (Baldwin, 2016, p. 28). The HRD department will provide supervisors with sample questions that they should consider asking their new employee at each



meeting. It is encouraged to set up meetings once a month with the new employee for the remainder of the ninety-day period to make sure he or she is receiving the proper support as they become acquainted in their new role.

## **Conclusion**

In conclusion, research suggests that within the first 30 days of employment, a new employee will have decided whether or not they feel welcomed in the workplace. This means that Mayo Clinic's approach in orientation directly correlates with the employee's retention with the organization (Armstrong & Mitchell, 2008, p. 47). Mayo Clinic should design their orientation process to meet the needs of their new employees through enthusiasm and support during the onboarding process. This should provide guidance of the four C's mentioned above, while keeping the new employee's attention throughout orientation.

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