

Healthcare Client Cuts Training Time in Half with Comprehensive Internal Documentation

Case Study

Client Characteristics

- Industry: Healthcare
- Location: Houston, Texas, United States
- Size: Large (\$4B+ revenue)
- Operations: Primarily Houston; national scope

Explore how this healthcare client partnered with Factum to help them solve a pressing training challenge by engaging in our documentation and resource development & education capabilities.

The Client Faces a Challenge

It is the age-old story for a department in a large organization: Limited time and limited budget. The story was no different for our Client, an employee health department within a large healthcare institution; they provided occupational health and treatment services to thousands of institution employees throughout the year.

While they were able to continually excel at employee care, they realized too much time (6–8 months) and money were being spent in training new hires within the department, limiting efficiency.

Additional Factors

Adding to this challenge were other factors. For one, they had recently purchased and customized Medgate, an environmental health & safety (EHS) software, for the department to aid in information capturing and comply with the federal directive for electronic medical records (EMR). Due to the customization, the vendor-provided documentation was too generic and



Capabilities Employed:

Documentation
Resource Development
& Education



was not a sufficient resource for department employees to use effectively.

As well, there were currently several variations of handbooks drafted by different staff members of the department. Each handbook covered different subjects (e.g., nursing, administrative, software) and was written in distinct styles with no conformity or general standard.

Lastly, there was the lack of specific guidelines for the department. While they had access to institutional-level policies and procedures, they needed ones tailored to the department's needs, as well as written comprehensively and to the level of detail appropriate for new hires.

Looking Externally for Help

Realizing that their veteran staff members' time was limited and skills were honed for patient care, the Client determined an external resource was needed. They needed to find a firm capable of creating a comprehensive department manual that detailed department policies, procedures, and Medgate usage.

Key Takeaways

- Client's training window is too lengthy
 - Customized EHS software needs documenting
 - Department needs a single, comprehensive, tailored training source
 - Client must look externally to find appropriate help
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Factum Provides the Solution

In looking to the market, the Client found Factum, engaging with us across two of our primary capabilities: Documentation and resource development & education.

After an in-depth discussion of their training challenge, we determined that one of our long-standing business communication consultants would be best suited to address the Client's needs. With numerous successful documentation and training projects completed, we knew the Client was in great hands with this expert.

Defining the Process

Our consultant advised the Client on the various activities that would be needed to successfully complete and produce their desired documentation:

- Consultant review of any source materials related to department policies and procedures, as well as vendor-provided documentation
- Interviews with subject matter experts (SMEs) — namely nurses and administrative staff — to walk through, document, and standardize procedures
- Capture of software screenshots associated with documented procedures

- Reviews by SMEs to ensure presented information is accurate (i.e., content signoff)
- Reviews by management, or appointed designee, to ensure presented information fits department and institutional standards (i.e., final signoff/approval)

With the process clearly laid out, the Client was confident that the project would proceed smoothly and provided their approval for project kickoff.

Interviewing Reveals Important Insights

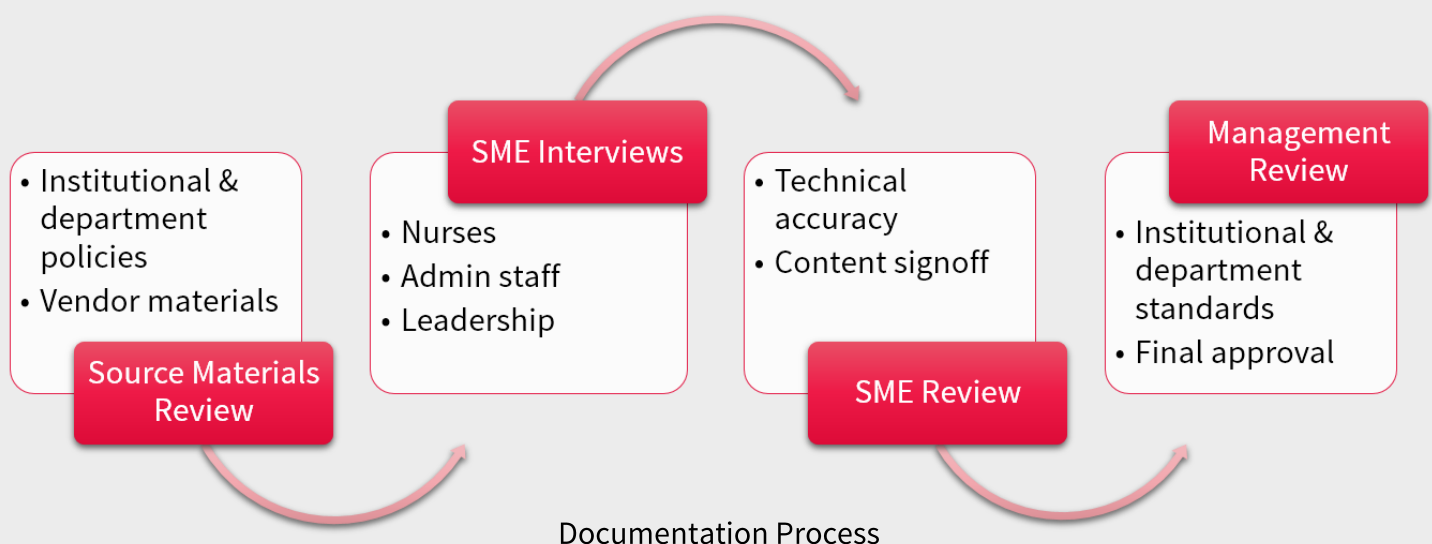
One of the most important parts of the process was interviewing the nurses and administrative staff. Beyond documentation, speaking with each staff member provided the opportunity to discover essential insights surrounding department workflows. These insights were

discussed with department supervisors and often led to simplification of the more complex workflows, as well as elimination of redundant efforts, aiding in their desire for greater efficiency.

Timely Delivery

After only a few months, our consultant delivered the completed manual that covered all aspects described in the original scope, plus a few other elements requested by the client during the documentation process.

The delivery was extremely timely, as two new staff members were being hired in the coming weeks, which would provide the perfect opportunity for user testing and feedback. The Client approved the manual shortly before the new hires started and quickly integrated it into their training workflow.



Reducing Training Time

We followed up with the Client 6 months after the project concluded—the typical length of time required for new hires to be fully productive.

When asked how our documentation efforts affected their typical training window, the department administrator had this to say:

*“Prior to the manual you put together, our **new hires typically needed 6 to 8 months** to fully acclimate. After we started using the manual, that time **dropped to between 3 and 4 months**. It definitely made a difference for our department.”*

The reduced training time did not only lead to higher productivity levels for the new hires, but also freed up the time of veteran staff members. Previously, veterans were shadowed by the new hires and often pulled away from their primary duties to answer questions or help in a task. The manual served as a near replacement for this happenstance, enabling the veteran staff members to concentrate on employee care and new hires to learn from a standardized source.

Key Takeaways

- Client engages Factum in its documentation and resource development & education capabilities
- Factum provides an expert resource who defines an appropriate process to address the Client’s training needs
- Client sees required training time for new hires halved
- Client sees productivity levels for whole department increase

Continued Benefits

With customers satisfied, our Client was naturally pleased as well. They garnered great benefits and improved their competitive edge by engaging with Factum in our documentation and resource development & education capabilities:

- Solved primary challenge by significantly reducing training time for new hires
- Increased productivity levels of staff members
- Provided opportunity for workflow improvement through detailed interviews
- Addressed auxiliary factors with comprehensive documentation

Since completing this project, our Client has partnered with us to keep their documentation updated as they adjust their business policies and upgrade their software.

Recently, they added two new EHS software packages as part of their workflow, which we've walked through and documented accordingly. We continue to keep their initial training window to a minimum and ensure the department remains efficient.

This Client's case is a prime example of adhering to [Our Mission](#) of partnering with our clients and transforming their business from within.

About Factum

Factum is a multi-faceted consulting firm that was founded with one thing in mind: Helping clients solve problems. The literal translation of Factum from Latin is “it is done,” which encapsulates our guiding principles of quality, dependability, and commitment.

Our Mission

Our Mission is to partner with clients and transform their business from within. We realize that for our clients to remain competitive in their market, we must employ our capabilities at the very core of their organization and ensure they continue to build on a solid foundation.

Our People

Our clients depend on Factum because we have strong relationships with the best talent across varied industries. This is because we’re very selective with the consultants we choose for client engagements.

When we need a consultant (or a team of consultants) for a project, we consider all they have to offer for the specific context, including needed expertise and adherence to our guiding principles.

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