

HR Life Cycle Project

Creating a human resources strategy for a healthcare facility

Step 1: Introduction

The purpose of this project is to create an in-depth analysis of the strategic life cycle within HR. By combining theoretical frameworks and practical tools, we can create a realistic case study that reflects the impact of various HR functions at each stage. The example that was chosen for this project is based on a real-life private health facility that offers outpatient care for the elderly. For privacy reasons any names, dates or places will be omitted or replaced with a new one. As a psychology student who has been passionate about human behavior and its motivation for a long time, I have recently developed an interest in how these aspects of managing people intersect with organizational strategies and goals. Therefore, I believe this project demonstrates how I can create methods that center both human and organizational needs within the HR context.

Note: Although I am the sole contributor of this project, the language used within this setting includes the passive “We” to create a realistic presentation of the case study and to immerse the reader into the project as well.

About the organization:

In the late 1990s, the founder of Sisu Haven worked by himself to create client-driven solutions for elderly care. Throughout the years, our organization grew and our services became indispensable for our clientele. In 2012, the first outpatient assisted living complex opened. The residence includes a senior citizens' center with daycare, service apartments, and a canteen with a small café. Today, the company employs over 150 people and serves more than 500 customers. Innovative ideas, enthusiasm and an ambitious team at our side are all what makes us stand out among other facilities.

For us, it is the people who are at the center of our work. Our team provides care for our patients while attending to all nursing and housekeeping needs with a high level of professionalism. Through continuous training programs, we offer all employees the chance to excel and perform their duties at their utmost capacity.

Mission, Vision and Values (MVV):

Our mission is to provide not only compassionate and reliable care to the elderly, but to also improve their own independence and overall quality of life.

With our creative solutions and personalized care, we consistently share our vision of setting the standard for senior outpatient care that nurtures a warm, welcoming environment for both our patients and staff.

Compassion, teamwork, the pursuit of professionalism and the respect for diverse backgrounds all make up our values.

Step 2: Creating a strategic Human Resource Management plan

The goal of this step is to align HR practices with our organization's mission, vision and values.

In order to reach this target, we first examine the current state of our organization and where we want to go. Currently, Sisu Haven has a total of 160 employees and 500 customers. The service we provide can be divided into outpatient care and daycare within the senior citizens' center. In the future, we want to expand our care services by opening more facilities within the city's district as well as improving our digital service. To remain an outstanding leader of outpatient care, our strategy must ensure a high retention rate among skilled caregivers, a robust talent pipeline and focus on reliable services, inclusion and innovation.

Based on our organization's business strategy, we need to develop strategic objectives that are in alignment with our MVV. These include:

- a) To reduce the turnover rate of caregivers by 15% within the next year
- b) To enhance our employer branding to attract younger, new talents
- c) To create an in-depth quarterly training program for staff members

Before we can create a strategic plan, we need to provide a workforce analysis that allows us to identify our current and future staffing needs as well as what strengths and weaknesses each role has.

To simplify the process we will use a short excel spreadsheet that gives us an overview of our organization's state:

Department	Position	Current no. of Employees	% of total Employees	Strengths	Potential Weaknesses
Nusing / Outpatient Care	Registered Nurse	38	23,8%	Clinical skills, patient care	Time management
	Certified Nursing Assistant	30	18,8%	Physical care, patient support	Handling conflict, communication gaps
	Personal Care Aides	25	15,6%	Independence, personal care	Responding and handling crises
Assisted Living and Daycare	Daycare Coordinators	8	5,0%	Interpersonal skills, engagement	Tech usage
	Housekeeping	15	9,4%	Time management, attention to detail	Lack of interaction with patients
	Kitchen / Cafe	10	6,3%	Cleanliness, teamwork	Lack of interaction with patients
Administration / Operations	Reception	6	3,8%	Organisation, filing and scheduling	No direct contact with patients
	Human Resources	3	1,9%	Interpersonal skills, communication	Strategic workforce planning
	Facility Manager	5	3,1%	Employee management, problem-solving skills	No legal and compliance knowledge
	Accounting	4	2,5%	Analytical skills, financial literacy	No healthcare related financial expertise, lack of communication with other departments
Training	Mentors	4	2,5%	Coaching, communication	Inexperience with adult learning
Medical Coordination	Doctors	5	3,1%	Medical knowledge	Cultural sensitivity, teamwork
IT Branch	IT Support	3	1,9%	System management, tech expertise	Lack of ommunication with other departments
Other support	Couriers	4	2,5%	Time management, physical skills	Emergency response knowledge, handling data

Spreadsheet 1: Overview of Sisu Haven's state

This spreadsheet provides us with valuable information. We can see that the majority of employees are stationed in nursing and direct patient care, while there is moderate support for roles such as assisted living and day care and smaller teams in the areas of admin, HR, training and IT. Assessing potential skills gaps in each of the individual roles allows us to design plans on how to address such risks.

Since our organization is planning to expand in the future and open more facilities, we need to determine key roles for each department. The ones most impacted by expansion would be nursing and care roles since they are a core part of the organization. A new location will need its own new team, which means we need to hire multiple registered nurses, nursing assistants, care aides and doctors since these roles work closely together. Facility roles such as housekeeping, kitchen staff and daycare coordinators will be impacted by the expansion as well, because inhouse services are required to sustain the workplace. Administrative roles such as reception and accounting staff will have a moderate increase. However, facility managers will be impacted much higher since they are essential for daily operations. In order to manage the recruiting, onboarding and retention of new employees, the HR department needs to be expanded as well. As a result, these roles will be moderately increased. Lastly, the IT department will be impacted at a medium level since the planning of new facilities means that there are more roles needed to manage data and records.

Overall, it is necessary to assess the importance of each role individually to prevent the issue of under-staffing and overworking the current staff. Generally speaking, it can be estimated that for the expansion of one additional facility, the core roles need to be doubled, while roles such as HR, finance and IT need to be slightly increased as they provide more centralized functions within the organization.

After analysing our current workforce, we can focus on drafting a strategic action plan that is based on our objectives. This plan includes our goals, what steps we need to take and which metrics we can use to measure the success of said goal.

Our first goal is to reduce the turnover rate of caregivers by 15% within the next year. For this specific goal we need to analyze the turnover factors and find out why employees leave. We can use exit interviews to develop strategies to improve employee morale and to guarantee that so-called “top performers” stay with our organization. However, we can also take a look at our current employees and make use of engagement surveys to identify any areas that require improvement before they negatively impact productivity and company culture. Another important point is to develop a more efficient onboarding program that focuses on the necessity of the first 90 days after hiring a new employee. Here we can introduce mentorship programs that pair newcomers with more experienced staff members in order to enhance talent development and increase employee retention. To achieve this goal, the retention data needs to be tracked by a HR analyst consistently. If the annual turnover report shows improvement compared to the last year for example, we can say that our goal of reducing the turnover rate is successful.

Our second goal is to enhance our employer branding to attract younger, new talents. For this goal we should focus on building a strong Employer Value Proposition (EVP) that highlights themes such as work-life balance, meaningful work and opportunities for growth since all of these are important for the younger generation. Afterwards, we can implement a digital presence on social media platforms such as Instagram, TikTok and LinkedIn that showcase our team, the work we do and what benefits employees can receive. By concentrating on the usage of inclusive language and aesthetic design in our content, we can appeal to the younger audience and build a positive reputation. An increase in younger

applicants, high social media engagement through likes, comments and shares as well as reduced time to fill open roles are all metrics we can use to measure our success.

Our last goal is to create an in-depth quarterly training program for staff members. To ensure growth opportunities for our employees, it is necessary to assess any gaps in their skills first. We can use past performance reviews and surveys to identify areas of improvement that employees might need for a specific role. It is important that we prioritize any training needed in areas such as communication, patient care and teamwork as these build the foundation of our organization. For the development of the training plan it is crucial that we include digital module options to increase the flexibility of our training. After the plans are created, we need to ensure that the training sessions are scheduled and communicated in advance. Furthermore, we can log employees' attendance and track their participation through assessments to see if there are any improvements needed. To measure the success of our goal we can use the following metrics: the attendance rate for the training, assessment scores after the training and feedback scores based on a scale of 1 to 5. Positive results in these metrics reflect positively on the achievement of our goal as well.

The last part of this step will focus on which HR policies need to be implemented that support our organization's objectives. Our mission is to provide compassionate care to the elderly and improve their quality of life, all while nurturing an innovative, professional and diverse work environment. This means that the following policies are essential to us:

1. An inclusive hiring policy that aligns with our employer brand
2. An onboarding policy that keeps employees engaged and strengthens their retention
3. A training policy that focuses on improving our employees' skills and quality of service
4. A performance management policy that keeps employees accountable and motivated
5. A retention policy that reduces turnover rates and identifies employee issues as early as possible
6. A diversity, equity and inclusion (DEI) policy that enables an open-minded and welcoming work environment to everyone

This planning ensures that all of our HR activities are tied directly to the growth of both our organization and our employees so that we can provide high-quality care to our patients.

Step 3: Conducting a job analysis and creating a job description

The goal of this step is to prepare ourselves for the hiring process of a new position. To understand how diverse the work in our facility can be, we will conduct a job analysis of two different roles that includes each of the role's responsibilities, qualifications and needed skills. Afterwards, we will create a structured job description based on the key information of the analysis.

The first job position will be of a certified nurse assistant. Certified nursing assistants are part of the nursing, and more specifically, the outpatient care department. This position provides high-quality care and safety by ensuring that the patient's needs are met at all times. They are an integral part of the team and coordinate tasks with other departments if needed.

Their responsibilities include:

- ☐ Assisting patients with daily activities such as bathing, dressing, eating and taking medications
- ☐ Recording and monitoring vital signs such as temperature, blood pressure and pulse
- ☐ Reporting any changes to the nursing and medical staff
- ☐ Providing assistance to patients with low mobility by transferring and positioning them
- ☐ Keeping patient spaces and equipment clean
- ☐ Documenting all provided services accurately and in detail

Commonly needed skills and knowledge include:

- ☐ Strong communication and interpersonal skills
- ☐ Attention to detail
- ☐ Excellent problem-solving abilities
- ☐ In-depth knowledge of policies and regulations regarding patient care
- ☐ Basic medical knowledge
- ☐ Physical stamina

Required qualifications are:

- ☐ High school diploma or equivalent
- ☐ Completion of state certified nursing assistant training program
- ☐ Previous working experience in a healthcare related setting (preferred)

The working conditions include:

- ☐ Rotating shifts (day, night, weekend and holidays)
- ☐ Active participation in tasks such as physical labor and handling patients
- ☐ Exposure to diseases and bodily fluids

Based on this job analysis, we will now create a job description that highlights the information we gathered before.

Job description: Certified Nursing Assistant (CNA)

Department: Nursing / Patient Care

Location: Berlin, Germany

Job type: Full-time

Position Overview:

Provides assigned patients with routine daily nursing care and services in compliance with each patient's care plan while maintaining a clean and safe environment.

Job Responsibilities:

- ☐ Assist patients with daily activities such as bathing, dressing, eating and taking medications
- ☐ Record and monitor vital signs
- ☐ Report any changes to the nursing and medical staff
- ☐ Provide assistance to patients with low mobility by transferring and positioning them
- ☐ Keep patient spaces and equipment clean
- ☐ Document all provided services

Qualifications:

- ☐ High school diploma or equivalent
- ☐ Current certification as a Certified Nursing Assistant
- ☐ Proof of successful completion of health assessment and nursing foundation courses

Skills and Knowledge:

- ☐ Strong communication and interpersonal skills
- ☐ Attention to detail
- ☐ Excellent problem-solving abilities
- ☐ In-depth knowledge of policies and regulations regarding patient care
- ☐ Basic medical knowledge
- ☐ Physical stamina

Experience:

- ☐ 1+ years of working experience in a healthcare related setting (preferred)

Job types:

- ☐ Full-time
- ☐ Rotating shifts (day, night, weekend and holidays)

Job Benefits:

- ☐ Flexible work schedule
- ☐ Paid sick time
- ☐ Total Rewards package: Sisu Haven offers an annual employee bonus that rewards team members based on their performance

The second job position will be of a facility manager. The facility manager is in charge of the outpatient care center's daily operations. This includes managing logistics, housekeeping, and maintenance to guarantee a welcoming, patient-friendly facility as well as a safe and efficient working environment for our employees.

Their responsibilities include:

- ☐ Supervising the maintenance, repairs and upgrades of the facility
- ☐ Coordinating the staff's activities such as nursing, housekeeping and logistics
- ☐ Maintaining safety, order and cleanliness in all areas of responsibility
- ☐ Managing the facility's budgets and expenses including vendor contracts and the acquisition of supplies
- ☐ Overseeing the hiring, training and onboarding of new employees
- ☐ Ensuring compliance with health and safety regulations

Commonly needed skills and knowledge include:

- ☐ Exceptional leadership and people management skills
- ☐ Strong communication and interpersonal skills
- ☐ Resourceful approach to problem solving and decision making
- ☐ Familiar with budgeting and project coordination
- ☐ Technical knowledge regarding building systems

Required qualifications are:

- ☐ Bachelor's degree or equivalent in Business, Healthcare Administration or related field
- ☐ Good computer skills such as MS Office and facility management software
- ☐ Previous experience in facility management (ideally in a healthcare setting)

The working conditions include:

- ☐ Working in an office and facility setting
- ☐ Occasionally work on the weekends including on-call duty for emergencies

Now, we will create a second job description that matches the information we previously collected.

Job description: Facility Manager

Department: Administration and Operations

Location: Berlin, Germany

Job type: Full-time

Position Overview:

Oversees day-to-day activities of the facility, including maintenance, housekeeping and logistics to ensure a safe environment for patients and staff.

Job Responsibilities:

- ☐ Supervise the maintenance, repairs and upgrades of the facility
- ☐ Coordinate the staff's activities such as nursing, housekeeping and logistics
- ☐ Maintain safety, order and cleanliness in all areas of responsibility
- ☐ Manage the facility's budgets and expenses including vendor contracts and the acquisition of supplies
- ☐ Oversee the hiring, training and onboarding of new employees
- ☐ Ensure compliance with health and safety regulations

Qualifications:

- ☐ Bachelor's degree or equivalent in Business, Healthcare Administration or related field
- ☐ Computer skills such as MS Office and facility management software

Skills and Knowledge:

- ☐ Leadership and people management skills
- ☐ Communication and interpersonal skills
- ☐ Resourceful approach to problem solving and decision making
- ☐ Familiar with budgeting and project coordination
- ☐ Technical knowledge regarding building systems

Experience:

- ☐ 2+ years of working experience in facility management ideally in a healthcare setting

Job types:

- ☐ Full-time
- ☐ Occasional work schedules on the weekends including on-call duty for emergencies

Benefits:

- ☐ Flexible work schedule
- ☐ Paid sick time
- ☐ Total Rewards package: Sisu Haven offers an annual employee bonus that rewards team members based on their performance

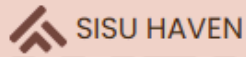
Step 4: Talent Acquisition Strategy

The goal of this step is to attract, identify and select the right candidates for our organization. We will focus on what pre-hiring practices are needed, how we can advertise new open positions and actively source for suited candidates as well as how to design the selection process more effectively.

Based on our workforce analysis from earlier, we can identify that the positions of caregiver roles such as certified nursing assistants need more employees due to higher turnover rates and the plan of expanding our facility. The increase in turnover rates is not an exclusive phenomena to our organization alone, but rather a trend that can be identified within the healthcare field in general. Due to low pay, long working hours and the demanding nature of the work, employees in the healthcare field report feelings of dissatisfaction and stress. This leads to employees quitting and managers having to hire new workers, which further increase costs for organizations due to the recruiting and training of new employees. Furthermore, the remaining employees experience an increased amount of workload and distress from the understaffing, contributing to even higher turnover rates. Therefore, it is necessary to build a recruitment strategy that allows us to recruit both internally and externally. Internal recruitment positively impacts our employees by giving them a sense of belonging and the opportunity to grow within our organization. External recruitment strategies are especially important for positions such as caretakers since they are mostly advertised as entry-level or mid-level. There is a continuous need to bring in new talents to fill these positions due to their high demand and turnover rates. However, we can still provide opportunities for these positions to grow and advance in their career. This way we can address the issue of immediate staffing needs while also strategically building a talent pipeline that allows our employees to succeed in higher positions in the future.

In order to reach a bigger pool of potential candidates, it is necessary to create job advertisements that align with our organization's values. These ads should reflect our mission and expectations for the new employee. By integrating memorable and positive opening lines, we can show the impact our organization offers to its patients. The job advertisement should also include the core responsibilities and qualifications in short bullet points so that potential candidates know upfront whether or not they're suited for the position. The most important part of the advertisement are the benefits that our organization can provide for employees since these stand out the most to candidates.

An example for a job advertisement for the position of a certified nursing assistant could be structured this way:



WE'RE HIRING

CERTIFIED NURSING ASSISTANTS

Responsibilities:

- ✓ Assist elderly patients with daily living activities
- ✓ Monitor and report vital signs
- ✓ Maintain a clean and safe environment
- ✓ Support patients every step on their journey

Qualifications:

Certification as a certified nursing assistant
Strong communication skills, empathy and critical thinking



Send your application to:
HIRING@SISU-HAVEN.COM



Picture 1: Job advertisement for the position of a Certified Nursing Assistant

These job advertisements can be posted on job boards for sites such as Indeed, StepStone or LinkedIn or at local nursing schools and job fairs where students and recent graduates can see them.

For high demand positions, waiting for candidates to apply to us is not always enough. Instead, we need to proactively look for potential talents that can be a good fit. Before we search for candidates, it is necessary to create a profile of an ideal candidate for each role we need to fill. For a certified nursing assistant this could include qualifications such as certificates and experience in care, soft skills such as empathy, patience and communication as well as living close to our facility.

After creating an outline of this profile we can search for candidates on platforms such as LinkedIn, Indeed, StepStone or XING. By making use of keywords and boolean operators, we can enable more targeted search queries.

For the role of a certified nursing assistant we could use the following search query for example:

("Certified Nursing Assistant" OR "CNA") AND "outpatient care" AND location: "Berlin"

This way we will only get search queries with candidates that are certified nursing assistants, work in outpatient care and are stationed in Berlin, Germany.

We can use further filters on platforms such as LinkedIn Recruiter to narrow down our candidate pool even more. These filters include the location radius, industry, years of experience and skills that are suitable for the role.

After finding suitable candidates, we can directly reach out to them with a short and personalized message that comes across as friendly and professional.

Step 5: Interviewing and Selection

The goal of this step is to select top candidates by designing an interview strategy that is tailored to each specific role. First, we need to assess which interview format is suited for which role. The position of a certified nursing assistant should include a structured and behavioral interview that allows for situational questions. The work of a certified nursing assistant is physically and emotionally demanding and requires skills such as patience, compassion and technical knowledge. By choosing a structured interview format, we can reduce unconscious biases in the selection process. Situational questions on the other hand, test the candidate's ability to be empathetic and flexible.

For the position of a facility manager we should include a behavioral and situational interview format, but also integrate the option of a panel interview. This position requires skills such as leadership, decision-making and conflict resolution. By integrating a panel into this interview, we can have numerous participants that each evaluate the candidate on their leadership abilities.

Each role should have a list that includes criteria candidates can be evaluated upon. These criterias should be directly tied to the responsibilities and skills that are required for their respective position.

A criteria list for the position of a certified nursing assistant can include topics such as communication skills, empathy, medical knowledge and their response to situational questions. Meanwhile, a list for the position of a facility manager can include topics such as leadership skills, ability to solve problems, operational knowledge and communication within the team. It is necessary to adapt these lists to each individual role and their requirements.

In order to evaluate the candidates' scoring for the list of criterias we can use a simple rubric with the scale of one to five: 1 meaning poor, 2 meaning needs improvement, 3 meaning acceptable, 4 meaning good and 5 meaning excellent. Therefore, a candidate can score for each criteria between 1 to 5 depending on their skills.

During the interview process it is beneficial to use open-ended questions as they encourage candidates to discuss and elaborate their answers.

Questions that can be asked for the role of a certified nursing assistant include:

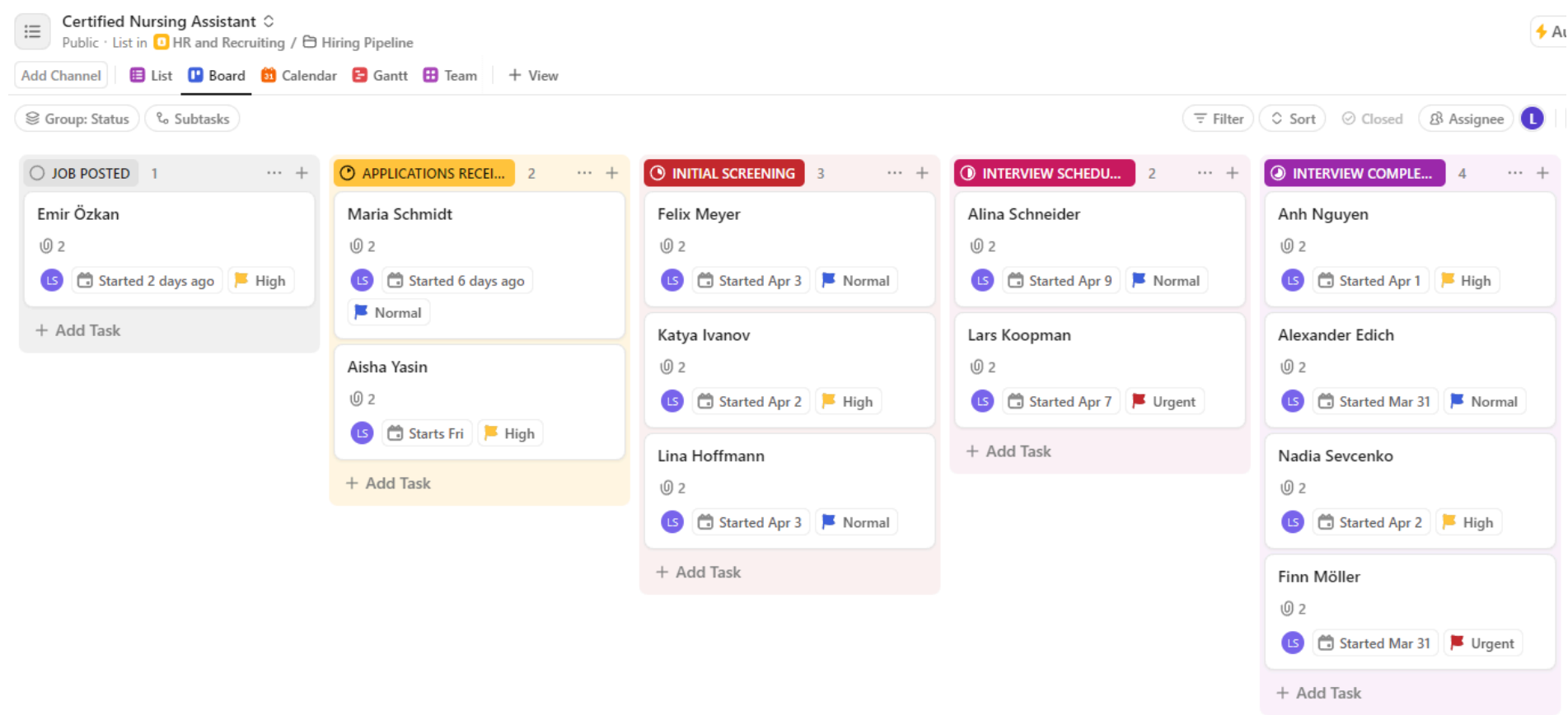
1. How would you handle a situation where a patient refuses to take medication?
2. Tell me about a time when you had to resolve a conflict with a family member of a patient.
3. How do you handle stress in this fast-paced environment?
4. What precautions do you take to prevent infections?
5. Describe your work process when entering a patient's room at the beginning of your shift.

Questions that can be asked for the role of a facility manager include:

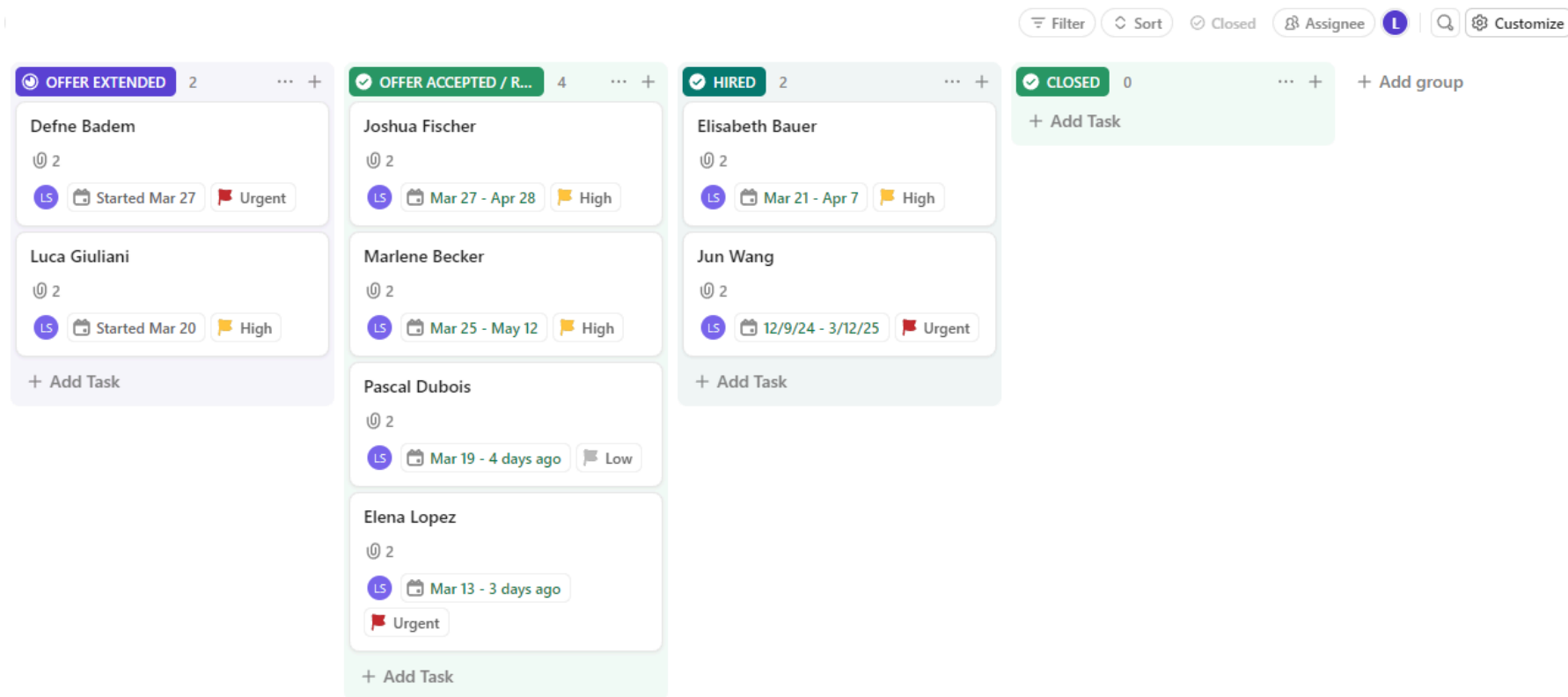
1. What software have you used before to track facility maintenance?
2. How do you ensure compliance with regulations?
3. Can you tell me about a time when you had to manage an emergency situation at a facility and how did you solve it?
4. What metrics do you use to measure the performance of your team?
5. Describe a time when you had to manage multiple projects at the same time. How did you prioritize your tasks efficiently?

To visualize the hiring process more clearly, we can create a ClickUp pipeline that allows us to carefully track each candidate through the steps. To make this example more realistic, each candidate has their own distinct skills and weaknesses as well as different circumstances and career paths.

The following two pictures display a board view of the candidate pipeline for the position of a Certified Nursing Assistant:



Picture 2: Overview of the candidate pipeline for Certified Nursing Assistant position



Picture 3: Overview of the candidate pipeline for Certified Nursing Assistant position

We can see that there are 20 candidates in total within the hiring process for the position of a Certified Nursing Assistant. The ClickUp pipeline has 8 stages: job posted, application received, initial screening, interview scheduled, interview completed, offer extended, offer accepted / rejected and hired.

The following pictures provide examples of different candidates at varying hiring stages for the position of a Certified Nursing Assistant:

Task ▾86c356p03

Ask AI

Emir Özkan

Ask Brain to write a description · create a summary · find similar tasks · or ask about this task

Status

JOB POSTED ▸ ✓

Assignees

LS

Dates

2 days ago → Due

Priority

High

Time Estimate

Empty

Track Time

Add time

Tags

Empty

Relationships

Empty

Add description

Write with AI

2

Custom Fields

Assigned to	LS
Comments	New applicant, resume needs to be reviewed
Contact information	emirozkan@gmail.com
Interview Date	–
Notes	Fluent in Turkish
Role applied for	Certified Nursing Assistant
Score	☆☆☆☆☆
Skills & Certifications	–

Picture 4: Candidate Emir Özkan who is at the “job posted” stage

Task ▾

86c356h0e

Ask AI

Maria Schmidt

Ask Brain to write a description · create a summary · find similar tasks · or ask about this task

Status

APPLICATIONS RECEIVED ▾ ✓

Dates

6 days ago → Due

Time Estimate

Empty

Tags

Empty

Assignees

LS

Priority

Normal

Track Time

Add time

Relationships

Empty

Add description

Write with AI

2

Custom Fields

Assigned to	LS
Comments	Application review complete, has background in elderly patient care
Contact information	mariaschmidt@hotmail.com
Interview Date	–
Notes	Available full-time
Role applied for	Certified Nursing Assistant
Score	☆☆☆☆☆
Skills & Certifications	CNA CertificateCPR Training

Picture 5: Candidate Maria Schmidt who is at the “applications received” stage

Task 86c357daj Ask AI

Felix Meyer

Ask Brain to write a description · create a summary · find similar tasks · or ask about this task

Status	INITIAL SCREENING	Assignees	LS
Dates	Apr 3 → Due	Priority	Normal
Time Estimate	Empty	Track Time	Add time
Tags	Empty	Relationships	Empty

Add description

Write with AI

2

Custom Fields

Assigned to	LS
Comments	Composed demeanor, very engaged towards patients' well-being
Contact information	felix.meyer@gmail.com
Interview Date	Tomorrow
Notes	Currently works part-time at another facility
Role applied for	Certified Nursing Assistant
Skills & Certifications	CNA Certificate CPR Training

Picture 7: Candidate Felix Meyer who is at the “initial screening” stage

Task
86c357f8g
Ask AI

Lars Koopman

Ask Brain to
write a description
create a summary
find similar tasks
or ask about this task

Status

INTERVIEW SCHEDULED

✓

Dates

Apr 7
→
Due

Time Estimate

Empty

Tags

Empty

Assignees

LS

Priority

Urgent

Track Time

Add time

Relationships

Empty

Add description

Write with AI

2

Custom Fields

Assigned to	LS
Comments	Internal candidate (referred by Anya Dobrow)
Contact information	larskoopman25@gmail.com
Interview Date	Tue
Notes	4 years of experience in outpatient care, works well under pressure
Role applied for	Certified Nursing Assistant
Score	☆☆☆☆☆
Skills & Certifications	CNA Certificate CPR Training

Picture 7: Candidate Lars Koopman who is at the “interview scheduled” stage

Task ▾

86c357fx8

Ask AI

Anh Nguyen

Ask Brain to [write a description](#) · [create a summary](#) · [find similar tasks](#) · or [ask about this task](#)

Status

INTERVIEW COMPLETED ▶ ✓

Assignees

LS

Dates

Apr 1 → Due

Priority

High

Time Estimate

Empty

Track Time

Add time

Tags

Empty

Relationships

Empty

Add description

Write with AI

@ 2

Custom Fields

Assigned to	LS
Comments	Multilingual, flexible work schedule
Contact information	anh.nguyen@gmail.com
Interview Date	6 days ago
Notes	Great understanding of elder psychology
Role applied for	Certified Nursing Assistant
Score	★★★★☆
Skills & Certifications	CNA Certificate

Picture 8: Candidate Anh Nguyen who is at the “interview completed” stage

Task 86c357kgx Ask AI

Luca Giuliani

Ask Brain to write a description · create a summary · find similar tasks · or ask about this task

Status

OFFER EXTENDED

✓

Assignees

LS

Dates

Mar 20 → Due

Priority

High

Time Estimate

Empty

Track Time

Add time

Tags

Empty

Relationships

Empty

Add description
Write with AI

2

Custom Fields

Assigned to	LS
Comments	Passionate and dedicated towards work
Contact information	luca97.giuliani@gmail.com
Interview Date	Mar 31
Notes	Highly motivated to learn more, ready to start in 3 weeks
Role applied for	Certified Nursing Assistant
Score	★★★★★
Skills & Certifications	CNA CertificateCPR Training

Picture 9: Candidate Luca Guiliani who is at the “offer extended” stage

Task

86c357m93

Ask AI

Marlene Becker

Ask Brain to write a description · create a summary · find similar tasks · or ask about this task

Status

OFFER ACCEPTED / REJECTED

Dates

Mar 25 → May 12

Time Estimate

Empty

Tags

Empty

Assignees

LS

Priority

High

Track Time

Add time

Relationships

Empty

Add description

Write with AI

2

Custom Fields

Assigned to	LS
Comments	Accepted offer, highly-skilled in specialized care for dementia patients
Contact information	marlenebecker@gmail.com
Interview Date	Apr 4
Notes	Flexible work shifts, able to relocate to be closer to facility
Role applied for	Certified Nursing Assistant
Score	★★★★★
Skills & Certifications	CNA Certificate CPR Training

Picture 10: Candidate Marlene Becker who is at the “offer accepted” stage

Task ▾86c357nnf

Ask AI

Jun Wang

Ask Brain to [write a description](#) · [generate subtasks](#) · [find similar tasks](#) · or [ask about this task](#)

Status

HIRED

Dates

12/9/24 → Mar 12

Time Estimate

Empty

Tags

Empty

Assignees

Priority

Urgent

Track Time

Add time

Relationships

Empty

Add description

Write with AI

2

Custom Fields

Assigned to	
Comments	Onboarding complete
Contact information	jun.wang96@gmail.com
Interview Date	Feb 11
Notes	Excellent work ethic, potential for mentorship position in the future
Role applied for	Certified Nursing Assistant
Score	★★★★★
Skills & Certifications	CNA CertificateCPR Training

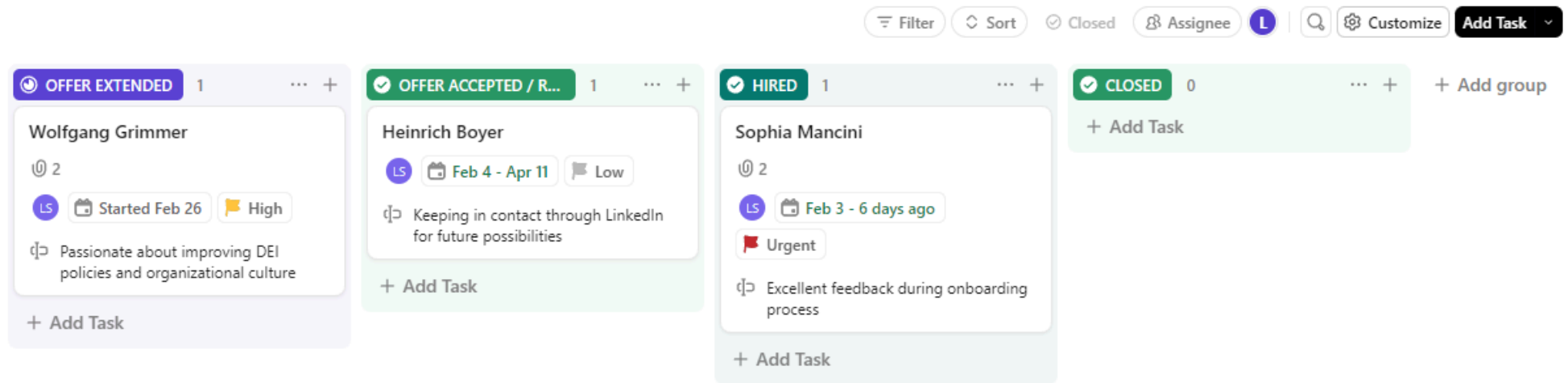
Picture 11: Candidate Jun Wang who is at the “hired” stage

The following two pictures display a board view of the candidate pipeline for the position of a Facility Manager:

The screenshot shows a Kanban board for the 'Facility Manager' position, which is public and part of the 'HR and Recruiting' and 'Hiring Pipeline' lists. The board has five columns representing different stages of the hiring process: 'JOB POSTED', 'APPLICATIONS RECEIVED', 'INITIAL SCREENING', 'INTERVIEW SCHEDULED', and 'INTERVIEW COMPLETED'. Each column contains candidate cards with their names, start dates, priority levels, and specific notes. The board interface includes a top navigation bar with tabs for 'List', 'Calendar', 'Gantt', 'Team', and 'Board', and a bottom section with filters, sorting, and assignment options.

Stage	Candidate	Start Date	Priority	Notes
JOB POSTED	Martin Schulz	Started 5 days ago	Normal	Potential good fit for facilities with technical demands
	Julius Reichwein	Started Apr 4	Urgent	Impressive resume, flexible work schedule
APPLICATIONS RECEIVED	Tanja Meyer	Started Apr 3	Normal	Availability regarding weekend schedules unclear
	Samuel Adamu	Started Apr 7	Normal	Need to ask for additional certificates
INITIAL SCREENING	Leyla Khalil	Started Apr 4	High	Highly structured resume, experience in leadership roles
	Christina Ording	Started Mar 14	Normal	Previous experience in managing cross-functional departments
INTERVIEW SCHEDULED	Johan Liebert	Started Mar 19	High	Interested in leadership development opportunities
	Eva Zimmermann	Started Mar 3	Urgent	Long-term experience in coaching teams, organized and efficient work ethic
INTERVIEW COMPLETED	Darius Braun	Started Feb 28	Normal	Shows high potential to grow

Picture 12: Overview of the candidate pipeline for Facility Manager position



Picture 13: Overview of the candidate pipeline for Facility Manager position

Here, we can see that there are 12 candidates in total within the hiring process for the position of a Facility Manager.

Again, the following pictures provide examples of different candidates at varying hiring stages for the position of a Facility Manager:

Task 86c357qe3

Ask AI

Martin Schulz

Ask Brain to write a description · generate subtasks · find similar tasks · or ask about this task

Status

JOB POSTED

Dates

4 days ago → Due

Time Estimate

Empty

Tags

Empty

Assignees

LS

Priority

Normal

Track Time

Add time

Relationships

Empty

Add description

Write with AI

2

Custom Fields

Q ⌘ +

Assigned to	LS
Comments	New applicant, resume needs to be reviewed
Contact information	martinschulz84@gmail.com
Interview Date	–
Notes	Potential good fit for facilities with technical demands
Role applied for	Facility Manager
Score	☆☆☆☆☆

Picture 14: Candidate Martin Schulz who is at the “job posted” stage

Task ▾86c357rcwAsk AI

Julius Reichwein

Ask Brain to write a description · generate subtasks · find similar tasks · or ask about this task

Status

APPLICATIONS RECEIVED ▸ ✓

Dates

Apr 4 → Due

Time Estimate

Empty

Tags

Empty

Assignees

LS

Priority

Urgent

Track Time

Add time

Relationships

Empty

Add description

Write with AI

2

Custom Fields

Assigned to	LS
Comments	Previous experience in managing an assisted living facility
Contact information	julius.reichwein81@gmail.com
Interview Date	–
Notes	Impressive resume, flexible work schedule
Role applied for	Facility Manager
Score	☆☆☆☆☆

Picture 15: Julius Reichwein who is at the “application received” stage

Task ▾

86c357tw8

Ask AI

Leyla Khalil

Ask Brain to write a description · generate subtasks · find similar tasks · or ask about this task

Status

INITIAL SCREENING ▾ ✓

Dates

Apr 4 → Due

Time Estimate

Empty

Tags

Empty

Assignees

LS

Priority

High

Track Time

Add time

Relationships

Empty

Add description

Write with AI

2

Custom Fields

Assigned to	LS
Comments	Open and professional demeanor, values team work
Contact information	leyla.khalil@gmail.com
Interview Date	–
Notes	Highly structured resume, experience in leadership roles
Role applied for	Facility Manager
Score	☆☆☆☆☆

Picture 16: Leyla Khalil who is at the “initial screening” stage

Task ▾

86c357vtx

Ask AI

Johan Liebert

Ask Brain to

write a description

· generate subtasks

· find similar tasks

· or ask about this task

Status

INTERVIEW SCHEDULED ▸ ✓

Dates

Mar 19 → Due

Time Estimate

Empty

Tags

Empty

Assignees

LS

Priority

High

Track Time

Add time

Relationships

Empty

Add description

Write with AI

2

Custom Fields

Assigned to	LS
Comments	Extended knowledge regarding budgeting and inventory systems
Contact information	johan.liebert87@gmail.com
Interview Date	Tue
Notes	Interested in leadership development opportunities
Role applied for	Facility Manager
Score	☆☆☆☆☆

Picture 17: Johan Liebert who is at the “interview scheduled” stage

Task 86c357whk Ask AI

Eva Zimmermann

Ask Brain to write a description · generate subtasks · find similar tasks · or ask about this task

Status	INTERVIEW COMPLETED ✓	Assignees	LS
Dates	Mar 3 → Due	Priority	Urgent
Time Estimate	Empty	Track Time	Add time
Tags	Empty	Relationships	Empty

Add description

Write with AI

2

Custom Fields

Assigned to	LS
Comments	Strong leadership skills, focused on team cohesion
Contact information	eva.zimmermann82@gmail.com
Interview Date	5 days ago
Notes	Long-term experience in coaching teams, organized and efficient work ethic
Role applied for	Facility Manager
Score	★★★★☆

Picture 18: Eva Zimmermann who is at the “interview completed” stage

Task 86c357x44 Ask AI

Wolfgang Grimmer

Ask Brain to write a description · generate subtasks · find similar tasks · or ask about this task

Status	OFFER EXTENDED ✓	Assignees	LS
Dates	Feb 26 → Due	Priority	High
Time Estimate	Empty	Track Time	Add time
Tags	Empty	Relationships	Empty

Add description

Write with AI

2

Custom Fields

Assigned to	LS
Comments	Excellent planning skills, shows initiative in work ethic
Contact information	wolfganggrimmer79@gmail.com
Interview Date	Apr 10
Notes	Passionate about improving DEI policies and organizational culture
Role applied for	Facility Manager
Score	★★★★★

Picture 19: Wolfgang Grimmer who is at the “offer extended” stage

Task 86c357xgh Ask AI

Heinrich Boyer

Ask Brain to write a description · generate subtasks · find similar tasks · or ask about this task

Status	OFFER ACCEPTED / REJECTED	Assignees	LS
Dates	Feb 4 → Apr 11	Priority	Low
Time Estimate	Empty	Track Time	Add time
Tags	Empty	Relationships	Empty

Add description

Write with AI

Custom Fields

Assigned to	LS
Comments	Rejected offer due to another opportunity at a different organization
Contact information	heinrich.boyer@gmail.com
Interview Date	Mar 17
Notes	Keeping in contact through LinkedIn for future possibilities
Role applied for	Facility Manager
Score	★★★★☆

Picture 20: Heinrich Boyer who is at the “offer rejected” stage

Task ▾



86c357y6e

Ask AI

Sophia Mancini

Ask Brain to [write a description](#) · [generate subtasks](#) · [find similar tasks](#) · or [ask about this task](#)

Status

HIRED  

Dates

Feb 3 → 5 days ago

Time Estimate

Empty

Tags

Empty

Assignees

LS

Priority


Urgent


Track Time


Add time

Relationships








Empty

 Add description

 Write with AI

 2

Custom Fields

 Assigned to	LS
 Comments	Transparent communication skills, works well in groups
 Contact information	sophiamancini@gmail.com
 Interview Date	Feb 27
 Notes	Excellent feedback during onboarding process
 Role applied for	Facility Manager
 Score	★★★★★

Picture 21: Sophia Mancini who is at the “hired” stage

Step 6: Onboarding

The goal of this step is to integrate new employees into our organization to ensure that they can become productive members of the team. It is important that we establish our organization's culture and values from the beginning so that new employees can understand what their role entails and what responsibilities they have to fulfill. By initiating open communication with supervisors and other team members, we can not only improve performance issues early on but also increase engagement and therefore employee retention overall.

By developing an outline for a fictional 90-day onboarding plan, we can establish a template that will help ensure a smoother onboarding experience for future new employees. This example divides the onboarding process into five phases: pre-onboarding, days 1-30, days 31-60, days 61-90 and post-onboarding.

Including pre- and post-onboarding strategies is necessary to ensure that new employees feel supported and included at every stage, which ultimately leads to higher engagement, productivity and retention.

During the first 30 days of onboarding, new employees participate in orientation activities to familiarize themselves with their work environment and team members. It is also the time when they are assigned to a mentor, who offers guidance, monitors their progress and answers questions directly. To maximize the success of this phase, it is important to involve new employees in as many activities as possible to integrate them as a member of the team so they can feel comfortable enough to show their unique ideas. Scheduling check-in meetings between the new employee and their supervisor is essential as well, since they provide learning opportunities where progress and needs for improvement can be openly discussed.

From days 31 to 60, the onboarding focuses on providing more independence to the new employee. They are encouraged to participate in team meetings, do tasks by themselves and gather feedback on their work, all of which help build confidence.

Days 61 to 90 center the new employee's long-term growth and success. This includes an onboarding survey to collect feedback on their overall experience, outlining realistic and achievable goals and scheduling a final check-in meeting to evaluate the onboarding process together.

Here, we have an overview of the 90-day onboarding plan:

90-Days Onboarding Plan Public · List in HR and Recruiting / Employee Onboarding

Automate Share AI ...

Add Channel List Board Calendar Team Gantt + View

Group: Status Subtasks Filter Sort Closed Assignee Search... Customize Add Task

PRE-ONBOARDING 5	DAYS 1 - 30 14	DAYS 31-60 3	DAYS 61-90 3	POST-ONBOARDING 2	CANCELLED 0
Announce new hire to team LS 6 days ago Urgent 1 subtask	Tour of the facility LS Tomorrow, 9:00 am - 10:00 am High 3 subtasks	Participate in team meetings LS May 26 - Jun 16 Normal 3 subtasks	Provide feedback survey LS Jun 30 - Jul 4 High 3 subtasks	Mentor review LS Jul 24 Urgent 2 subtasks	+ Add Task
Send welcome email to new hire LS 6 days ago High 2 subtasks	Meet all team members LS Tomorrow, 10:30 am - 11:30 am High 2 subtasks	Provide independent tasks to new hire LS Jun 2 - Jun 16 3 subtasks	Create list for long-term goals LS Jul 3 Normal 3 subtasks	Internal career path guide LS Aug 18 High 1 subtask	+ Add Task
Complete necessary paperwork LS 5 days ago High 2 subtasks	Complete paperwork LS Tomorrow, 11:30 am - 11:45 am Normal 2 subtasks	Continue weekly check-ins LS May 23 - Jun 20 High 2 subtasks	Schedule final meeting with mentor and supervisor LS Jul 21 Urgent 3 subtasks		
Set up email and other tools LS 3 days ago Normal 1 subtask	Provide compliance training LS Tomorrow, 12:00 pm - 12:30 pm High 2 subtasks	+ Add Task	+ Add Task		
Prepare new hire's workspace LS 2 days ago High 2 subtasks	Set up access to software programs LS Tomorrow, 12:45 pm - 1:15 pm				
+ Add Task					

Picture 22: 90-day onboarding plan

<div> <div>PRE-ONBOARDING</div> <div>5</div> <div>...</div> <div>+ Add Task</div> </div>				
Name	Assignee	Due date	Priority	
<div> <div>▼</div> <div> <div>○</div> <div>Announce new hire to team</div> <div>🔗 1</div> </div> </div>	LS	6 days ago	🚩 Urgent	...
<div> <div>○</div> <div>Write an email to introduce the new team member</div> </div>	LS	6 days ago	🚩 High	...
<div> <div>▼</div> <div> <div>○</div> <div>Send welcome email to new hire</div> <div>🔗 2</div> </div> </div>	LS	6 days ago	🚩 High	...
<div> <div>○</div> <div>Write a personalized welcome message</div> </div>	LS	6 days ago	🚩 Normal	...
<div> <div>○</div> <div>Provide information about first day at work</div> </div>	LS	6 days ago	🚩 High	...
<div> <div>▼</div> <div> <div>○</div> <div>Complete necessary paperwork</div> <div>🔗 2</div> </div> </div>	LS	5 days ago	🚩 High	...
<div> <div>○</div> <div>Update necessary contracts and forms</div> </div>	LS	5 days ago	🚩 High	...
<div> <div>○</div> <div>Print out forms beforehand</div> </div>	LS	5 days ago	🚩 Normal	...
<div> <div>▼</div> <div> <div>○</div> <div>Set up email and other tools</div> <div>🔗 1</div> </div> </div>	LS	3 days ago	🚩 Normal	...
<div> <div>○</div> <div>Create email and user login</div> </div>	LS	3 days ago	🚩 Normal	...
<div> <div>▼</div> <div> <div>○</div> <div>Prepare new hire's workspace</div> <div>🔗 2</div> </div> </div>	LS	2 days ago	🚩 High	...
<div> <div>○</div> <div>Clean desk or other workspace</div> </div>	LS	2 days ago	🚩 High	...
<div> <div>○</div> <div>Prepare access cards and uniform (if necessary)</div> </div>	LS	2 days ago	🚩 High	...

Picture 23: The pre-onboarding process

The pre-onboarding stage includes several tasks that are important to finish before an employee's first day in order to welcome them. They can range from general tasks such as announcing the arrival of the new hire and setting up their workspace to administrative tasks such as preparing contracts and forms. By including these responsibilities into the onboarding process, we can foster early engagement and minimize the risk of new employees reconsidering their decision.

<div> <div> DAYS 1 - 30 14 <div> Add Task </div> </div> </div>					
Name	Assignee	Due date	Priority	⊕	
<div> Tour of the facility 3 </div>		Today, 10am	High	...	
<input type="radio"/> Show all the workstations		Today	Urgent	...	
<input type="radio"/> Introduce break room, rest rooms and kitchen area		Today	Normal	...	
<input type="radio"/> Explain where emergency exits are located		Today	Urgent	...	
<div> Meet all team members 2 </div>		Today, 11:30am	High	...	
<input type="radio"/> Schedule short 1:1 introduction with every member		Today	High	...	
<input type="radio"/> Introduce to heads of the departments, including HR, Nursing and IT		Today	High	...	
<div> Complete paperwork 2 </div>		Today, 11:45am	Normal	...	
<input type="radio"/> Sign employee agreement		Today	High	...	
<input type="radio"/> Provide banking and ID information		Today	High	...	
<div> Provide compliance training 2 </div>		Today, 12:30pm	High	...	
<input type="radio"/> Review patient rights		Today	High	...	
<input type="radio"/> Sign compliance acknowledgement		Today	High	...	
<div> Set up access to software programs 2 </div>		Today, 1:15pm	Normal	...	
<input type="radio"/> Provide access to internal tools		Today	High	...	
<input type="radio"/> Provide access to patient systems		Today	High	...	
<div> Review organizational objectives 1 </div>		Today, 3pm	Normal	...	
<input type="radio"/> Presentation through supervisor		Today	Normal	...	
<div> Hand out employee handbook 2 </div>		Today, 3:30pm	High	...	
<input type="radio"/> Review policies		Today	High	...	
<input type="radio"/> Save important contact information		Today	High	...	

Picture 24: days 1-30 of the onboarding process

▼ Introduction to software programs 3		Tomorrow, 10:45am	High	...
<input type="radio"/> Provide beginner training for necessary tools		Tomorrow	High	...
<input type="radio"/> Assign simple tasks for practice		Wed	Normal	...
<input type="radio"/> Answer tech-related questions		Tomorrow	High	...
▼ Assign mentor to new hire 2		Tomorrow, 12:30pm	Urgent	...
<input type="radio"/> Schedule meeting with mentor		Tomorrow	Urgent	...
<input type="radio"/> Set expectations for shadowing sessions		Tomorrow	High	...
▼ Provide shadowing sessions 3		May 9	Urgent	...
<input type="radio"/> Schedule shadowing sessions ahead		Wed	Urgent	...
<input type="radio"/> Set goals for each sessions		May 9	High	...
<input type="radio"/> Provide constructive feedback through mentor		May 9	Urgent	...
▼ Outline facility layout and work schedules 2		Thu, 1:15pm	High	...
<input type="radio"/> Share digital layout of the facility		Thu	High	...
<input type="radio"/> Provide shift rotations		Thu	High	...
▼ Sign up for professional training 2		May 19	High	...
<input type="radio"/> Enroll new hire in relevant training modules		May 5	Urgent	...
<input type="radio"/> Track completion progress		May 19	High	...
▼ Complete tasks under supervision 3		May 20	Urgent	...
<input type="radio"/> Assign individual tasks to new hire		May 20	High	...
<input type="radio"/> Have mentor observe the work progress		May 20	Urgent	...
<input type="radio"/> Track skill-building consistently		May 20	High	...
▼ Schedule weekly check-in meetings 3		May 23	Urgent	...
<input type="radio"/> Set up regular check-ins each week		May 23	Urgent	...
<input type="radio"/> Discuss progress, questions and problems		May 23	Urgent	...
<input type="radio"/> Document the process		May 23	High	...

Picture 25: days 1-30 of the onboarding process (continuation)

<div> <div> <div> <i>!</i> DAYS 31-60 3 Add Task </div> </div> </div>					
Name	Assignee	Due date	Priority		
<div> <i>!</i> Participate in team meetings 3 </div>		Jun 16	Normal	...	
<input type="radio"/> Invite new hire to weekly team meetings		Jun 16	Urgent	...	
<input type="radio"/> Assign roles to members during meetings		Jun 16	Normal	...	
<input type="radio"/> Request feedback from new hire		Jun 16	High	...	
<div> <i>!</i> Provide independent tasks to new hire 3 </div>		Jun 16		...	
<input type="radio"/> Assign sample solo-shift to new hire		Jun 16	Urgent	...	
<input type="radio"/> Have new hire complete documentation independently		Jun 16	High	...	
<input type="radio"/> Ask for feedback		Jun 16	High	...	
<div> <i>!</i> Continue weekly check-ins 2 </div>		Jun 20	High	...	
<input type="radio"/> Review improvements regarding skills		Jun 20	High	...	
<input type="radio"/> Identify needs for training		Jun 20	High	...	

Picture 26: days 31-60 of the onboarding process

<div> <div> DAYS 61-90 </div> <div> 3 <div>...</div> <div>+ Add Task</div> </div> </div>					
Name	Assignee	Due date	Priority	⊕	
<div> <div>▼</div> <div> Provide feedback survey <div>🔗 3</div> </div> </div>		Jul 4	High	...	
<input type="radio"/> Share experience survey regarding onboarding experience		Jun 30	Urgent	...	
<input type="radio"/> Review feedback results with upper management		Jul 9	High	...	
<input type="radio"/> Take action on relevant concerns		Jul 25	Urgent	...	
<div> <div>▼</div> <div> Create list for long-term goals <div>🔗 3</div> </div> </div>		Jul 3	Normal	...	
<input type="radio"/> Set up SMART goals for the next 6 months		Jul 3	High	...	
<input type="radio"/> Align goals with organizational objectives		Jul 3	Urgent	...	
<input type="radio"/> Discuss new hire's strengths and potential		Jul 3	High	...	
<div> <div>▼</div> <div> Schedule final meeting with mentor and supervisor <div>🔗 3</div> </div> </div>		Jul 21	Urgent	...	
<input type="radio"/> Evaluate onboarding process together		Jul 21	Urgent	...	
<input type="radio"/> Access feedback from mentor and supervisor		Jul 21	Urgent	...	
<input type="radio"/> Provide final words of encouragement to new hire		Jul 21	Normal	...	

Picture 26: days 61-90 of the onboarding process

<div> <div> <div>▼</div> <div> <div>✓</div> <div>POST-ONBOARDING</div> </div> <div>2</div> <div>...</div> <div>+</div> <div>Add Task</div> </div> </div>					
Name	Assignee	Due date	Priority		
<div>▼</div> <div> <div>✓</div> <div>Mentor review</div> <div>🔗 2</div> </div>	LS	Jul 24	🚩 Urgent	...	
<div>○</div> <div>Discuss engagement of new hire</div>	LS	Jul 24	🚩 High	...	
<div>○</div> <div>Ask for feedback about mentoring process</div>	LS	Jul 24	🚩 High	...	
<div>▼</div> <div> <div>✓</div> <div>Internal career path guide</div> <div>🔗 1</div> </div>	LS	Aug 18	🚩 High	...	
<div>○</div> <div>Provide possible career and growth opportunities to new hire</div>	LS	Aug 18	🚩 High	...	

Picture 27: The post-onboarding process

The post-onboarding stage provides support beyond the initial integration period and further assists new employees to work independently. It is the last step of the onboarding experience where employees can address leftover issues and gather feedback after starting work. Maintaining support and engaging with the new employee further increases their satisfaction and chances of success in the long run.

This plan features a rather general overview of the onboarding process for new employees. For the role of a certified nursing assistant we need to emphasize the importance of shadowing the work of more experienced team members to give insight on how patient interaction, mobility aid and hygiene procedures are structured within our organization. It is essential to provide these new employees with continuous learning opportunities in order for them to be able to work independently as soon as possible. However, for the role of a facility manager we need to focus on expanding leadership skills and managing resources while coordinating staff and schedules efficiently.

To evaluate whether or not the onboarding is effective, we need to include a number of metrics that we can track throughout the onboarding process. These include:

1. Time to productivity

Time to productivity measures how long it takes a new employee to reach the necessary level of performance so they can perform their tasks independently. In order to measure this metric, we first need to define what it means for an employee to be productive, e.g. completing a certain number of projects within a time limit. Afterwards we can use feedback from supervisors at the 30, 60 and 90 day mark to measure how their productivity has changed and if it increased.

2. Training completion rate

A high training completion rate indicates that employees are interested in improving at their workplace and being more productive. Furthermore, it reflects higher retention rates and employee morale. To measure this metric, we calculate the percentage of new employees who complete mandatory training modules within a certain time period.

3. New hire satisfaction

Measuring new hire satisfaction is an essential part of the onboarding process. It is an effective method to gather feedback from new employees and learn if the practices within the onboarding plan are successful. To measure this metric, we provide surveys after the onboarding. It is important that the questions are consistent for each new employee so that we can gather what needs to be improved.

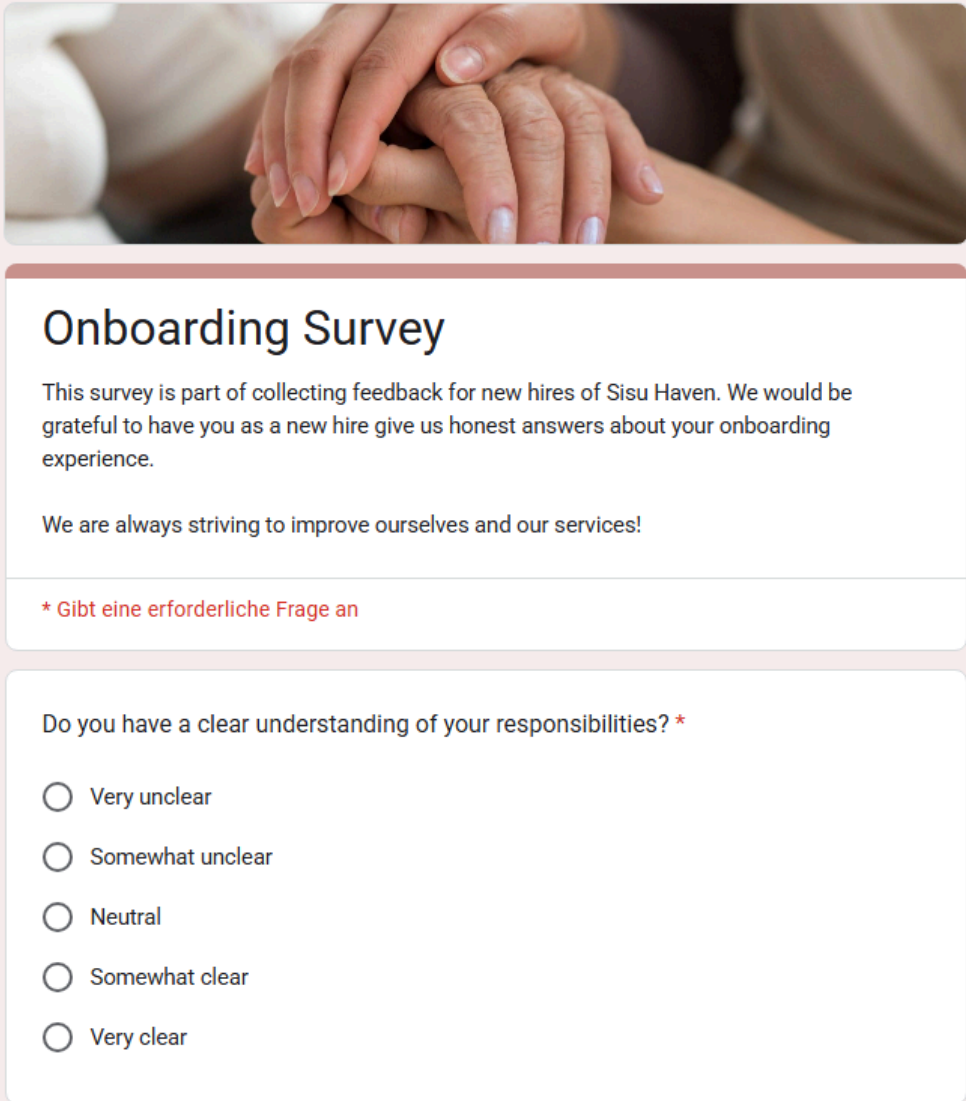
4. New hire turnover rate


The last metric we are gonna focus on is the new hire turnover rate. This metric can be measured by comparing the retention rate before implementing a specific onboarding model and after implementing it. If the number is higher than expected, it is a clear indicator that something within the hiring process or the workplace isn't functioning and needs to be addressed.

To further envision the idea of how the onboarding process can be applied to a real-life scenario, we can design a template for an onboarding survey. The onboarding survey includes a variety of questions regarding the onboarding process. It is a useful tool that allows us to communicate directly with a new employee and learn about their perspective regarding the onboarding journey.

The following pictures include screenshots of the onboarding survey that was created through Google forms.

The link to the survey can be found here: <https://forms.gle/J9Bt6NzkC3GqPWoo6>





Onboarding Survey

This survey is part of collecting feedback for new hires of Sisu Haven. We would be grateful to have you as a new hire give us honest answers about your onboarding experience.

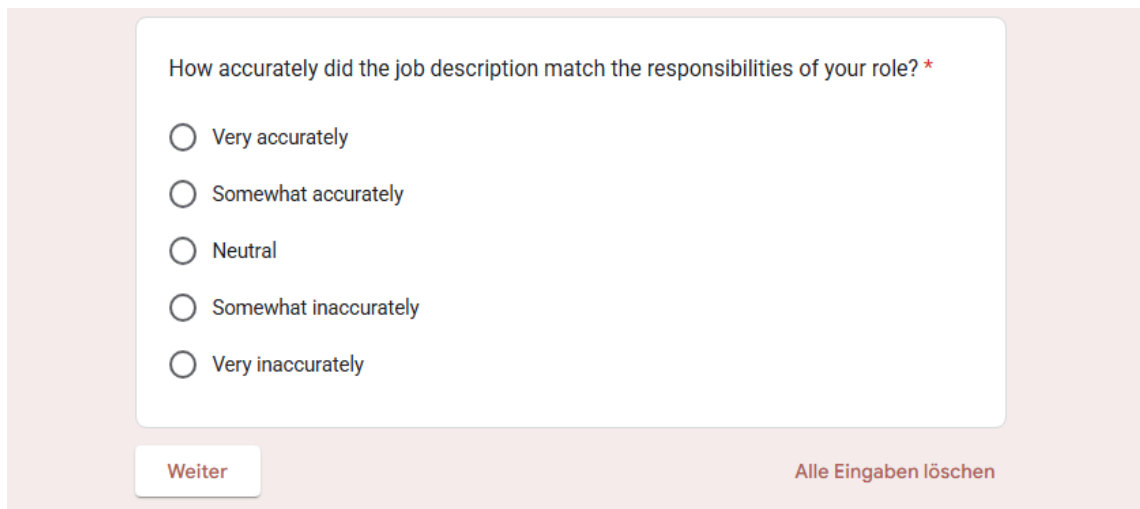
We are always striving to improve ourselves and our services!

* Gibt eine erforderliche Frage an

Do you have a clear understanding of your responsibilities? *

- ☐ Very unclear
- ☐ Somewhat unclear
- ☐ Neutral
- ☐ Somewhat clear
- ☐ Very clear

Picture 28: Onboarding survey



How accurately did the job description match the responsibilities of your role? *

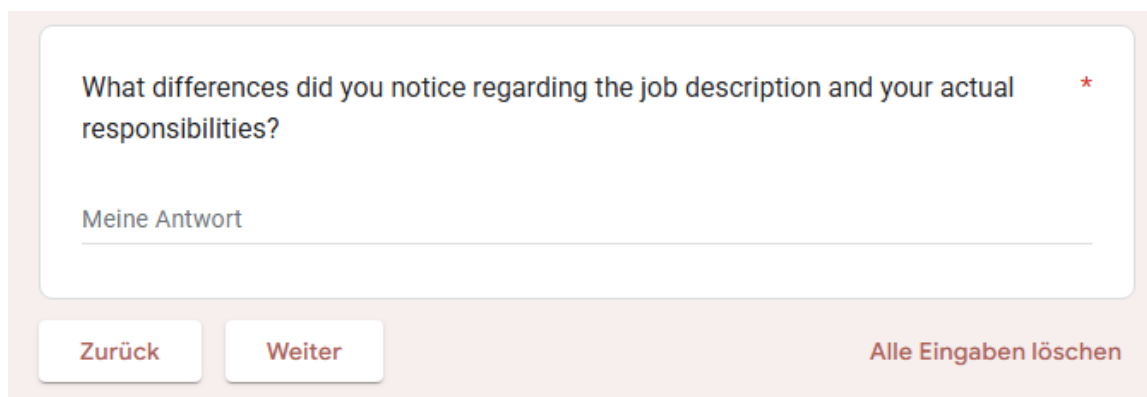
- ☐ Very accurately
- ☐ Somewhat accurately
- ☐ Neutral
- ☐ Somewhat inaccurately
- ☐ Very inaccurately

Weiter

Alle Eingaben löschen

Picture 29: Onboarding survey

If the employee answers the question above with neutral, somewhat inaccurately or very inaccurately, it will go to this question to further inquire about their issue:



What differences did you notice regarding the job description and your actual responsibilities? *

Meine Antwort

Zurück

Weiter

Alle Eingaben löschen

Picture 30: Onboarding survey

If the employee answered the question with very accurately or somewhat accurately instead, it will automatically go to this section:

The image shows a survey form with a light pink background. It contains four white question boxes stacked vertically. Each box has a question followed by radio button options. The first question asks if the onboarding process met expectations, with 'Yes' and 'No' options. The second question asks which aspect helped the most, followed by a text input field labeled 'Meine Antwort'. The third question asks if the process aligns with the organization's mission, vision, and values (MVV), with 'Yes', 'Somewhat', and 'No' options. The fourth question asks how welcome the employee felt, with 'Extremely welcome', 'Somewhat welcome', and 'Not welcome' options. At the bottom, there are three buttons: 'Zurück' (Back), 'Weiter' (Next), and 'Alle Eingaben löschen' (Delete all inputs).

Did the onboarding process meet your expectations? *

☐ Yes

☐ No

Which aspect of the onboarding process helped you the most? *

Meine Antwort

Did the onboarding process align with our organization's mission, vision and values (MVV)? *

☐ Yes

☐ Somewhat

☐ No

How welcome did your supervisor and team make you feel? *

☐ Extremely welcome

☐ Somewhat welcome

☐ Not welcome

Zurück Weiter

Alle Eingaben löschen

Picture 31: Onboarding survey

If the last question regarding the experience with other employees as pictured above is answered with either somewhat welcome or not welcome, it will go to this question:

For which reasons did you not feel welcome? *

Meine Antwort

Zurück Weiter Alle Eingaben löschen

Picture 32: Onboarding survey

The following question regarding the training experience includes branching logic as well and asks the user to provide further explanations if they answered with neutral, somewhat unhelpful or very unhelpful:

How helpful was the training you received when you started your position? *

☐ Very helpful

☐ Somewhat helpful

☐ Neutral

☐ Somewhat unhelpful

☐ Very unhelpful

Zurück Weiter Alle Eingaben löschen

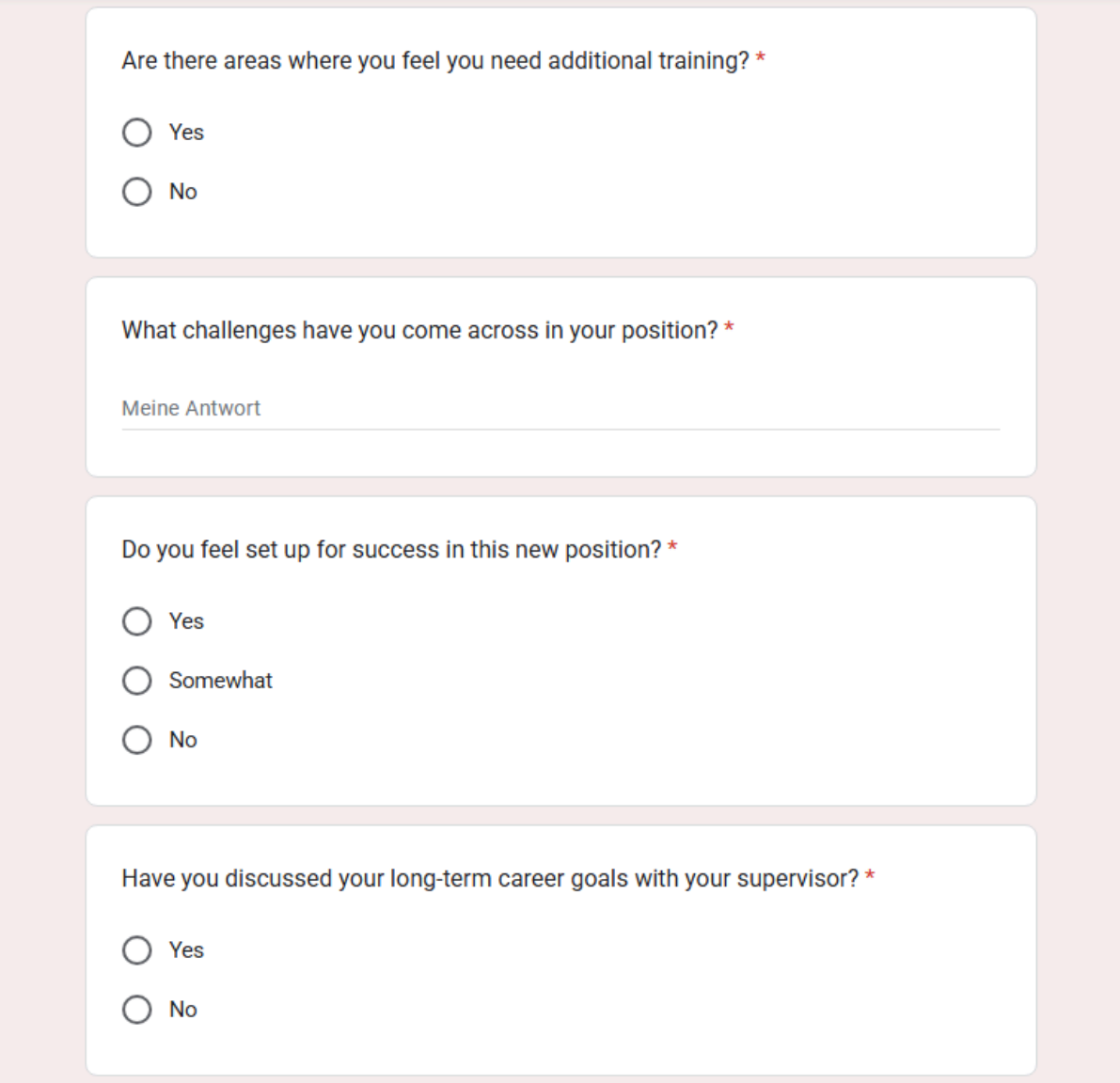
How can we improve the training experience? *

Meine Antwort

Zurück Weiter Alle Eingaben löschen

Pictures 33 and 34: Onboarding survey

The last section of the onboarding survey includes topics regarding success, career development and improvements on the onboarding process overall:



The image shows a screenshot of an onboarding survey form. It consists of four white rectangular boxes with rounded corners, each containing a question and radio button options. The questions are:

- 1. "Are there areas where you feel you need additional training? *" with options "Yes" and "No".
- 2. "What challenges have you come across in your position? *" with a text input field labeled "Meine Antwort".
- 3. "Do you feel set up for success in this new position? *" with options "Yes", "Somewhat", and "No".
- 4. "Have you discussed your long-term career goals with your supervisor? *" with options "Yes" and "No".

The entire survey is set against a light pink background.

Picture 35: Onboarding survey

On a scale of 1-10, how likely are you to recommend our organization to others based on your onboarding experience? *

1 2 3 4 5 6 7 8 9 10

☆ ☆ ☆ ☆ ☆ ☆ ☆ ☆ ☆ ☆

What suggestions do you have for improving the onboarding process in the future? *

Meine Antwort

Is there anything else you would like to share?

Meine Antwort

Zurück Senden Alle Eingaben löschen

Picture 36: Onboarding survey

By including a variety of multiple-choice, open-ended and rating scale questions we can gather a quantitative and qualitative understanding of the onboarding experience of a new employee. Analyzing the results of this survey helps us identify past successes and areas of improvement regarding the onboarding process.

Step 7: Employee Engagement and Retention

The goal of this step is to increase employee engagement and satisfaction in order to retain employees and reduce turnover rates overall.

Recent studies have shown that the following factors are key contributors of high turnover rates within the healthcare field: psychological aspects such as burnout and emotional exhaustion are identified as primary sources for increased turnover rates. Due to the demanding nature of the job, many workers deal with prolonged periods of stress, which can lead to physical and emotional health issues. Another key factor is the high workload within the healthcare field. The annual NSI National Healthcare Retention and RN Staffing Report in 2023 found that even before the COVID-19 pandemic over 58% of registered nurses left their position within two years due to the amount of patients they had to take care of. This phenomena only increased during the pandemic due to severe patient numbers and extreme stress, all of which further heightened turnover rates. Work-related factors such as low job satisfaction and low income are prevalent risk factors to pay attention to as well. For example, a meta analysis in 2020 found that between 1988 and 2019 around 46% of general practitioners world-wide intended to leave their position. This outcome could be linked to lower rates of job satisfaction and salaries, as both of these factors play an important role. Lastly, a lack of leadership or management that fails to foster a cohesive and supportive work environment can be cited as a key factor for turnover rates of nurses. If employees feel as if they can't effectively perform their responsibilities or that they are not valued for their work, they are more likely to seek these needs somewhere else.

To address these issues, we have to create structured plans that allow us to combine support and flexibility into the workspace of healthcare careers more adequately. By improving work schedules and integrating part-time options when available, we can reduce high workload and psychological factors such as burnout and stress. Furthermore, we can regularly offer training and other types of support to help employees cope with stress and build their resilience. In order for employees to feel more respected and valued for their work, we can introduce various opportunities to grow and advance in their career, e.g. providing further education or mentorship programs. Offering a competitive salary and regular bonuses are necessary as well since careers in the healthcare field are often underpaid. Similarly, we can reduce high rates of turnover by training managers in important leadership skills such as communication, empathy and problem-solving.

Although this project does not have the needed dataset to predict turnover rates through measures such as logistic regression, we can build a hypothetical profile of employees who are more likely to leave based on certain variables such as tenure, workload, job satisfaction / engagement and performance. In real life this data would be collected through surveys that rate employees' overall engagement and job performance. Instead, we will create a small dataset in Excel that includes information about different employees and whether or not they would realistically leave based on the risk factors we mentioned before.

To get an overview of how a risk chart looks like, we can use the following excel spreadsheet:

Employee ID	Employee Name	Age	Position	Tenure (in Years)	Workload	Job Satisfaction Score	Performance Rating
9836319	Aaminah Hadid	24	Certified Nursing Assistant	1	High	3.5 / 5	3.7 / 5
9148769	Lukas Visser	35	Facility Manager	7	High	3.2 / 5	4.1 / 5
9276938	Sophie Weber	41	Accounting	9	Moderate	4.6 / 5	5 / 5
9067382	Huy Pham	27	IT Support	2	Very High	2.5 / 5	4.4 / 5
9582963	Anastasia Petrov	48	Registered Nurse	12	Very High	5 / 5	5 / 5
9105863	Omar Haddad	26	Certified Nursing Assistant	2	High	2.1 / 5	2.8 / 5
9385923	Taras Kovalenko	33	Daycare Coordinator	3	Moderate	3.4 / 5	3.3 / 5
9405729	Eike Schmidt	42	Human Resources	6	Moderate	4.5 / 5	4.7 / 5
9470368	Lotte Janssen	23	Receptionist	2	Low	3.2 / 5	4.2 / 5
9683015	Dmitir Ivanov	37	Courier	5	Moderate	1.6 / 5	2.6 / 5

Spreadsheet 2: Employee Risk Chart

Here, we have the profiles of ten employees who are at differing risk levels of leaving our organization. In addition to personal information such as employee ID, name, age and tenure, we also added how high the workload is and what score they achieved during their last engagement survey and performance rating. This information helps us get a better overview of how each employee is doing overall.

Risk Factors	Risk Level	Probability of Leaving (in %)	Counteracting Measures
Beginning of career, gaps in skill, high workload	Medium	43%	Offer training for development, reduce workload
High responsibility and workload, potential burnout	Medium	41%	Provide leadership coaching, delegate tasks if possible
Nothing significant	Low	12%	Reward performance
Severe stress, expressed feeling undervalued	High	81%	Reduce workload by opening more IT positions, show recognition for work
None	Low	5%	Integrate in mentoring new employees, reward performance (possible promotion)
Lack of engagement, shows early signs of burnout	High	76%	Offer performance coaching and mental health support, reduce workload
Stagnation in career development	Medium	40%	Design a career development plan
None	Low	9%	Reward performance
Monotonous work, low chance of promotion	Medium	39%	Ask about future career plans, provide retraining options
Very low job satisfaction, physical pain and exhaustion	High	92%	Discuss transfer options, provide wellness support

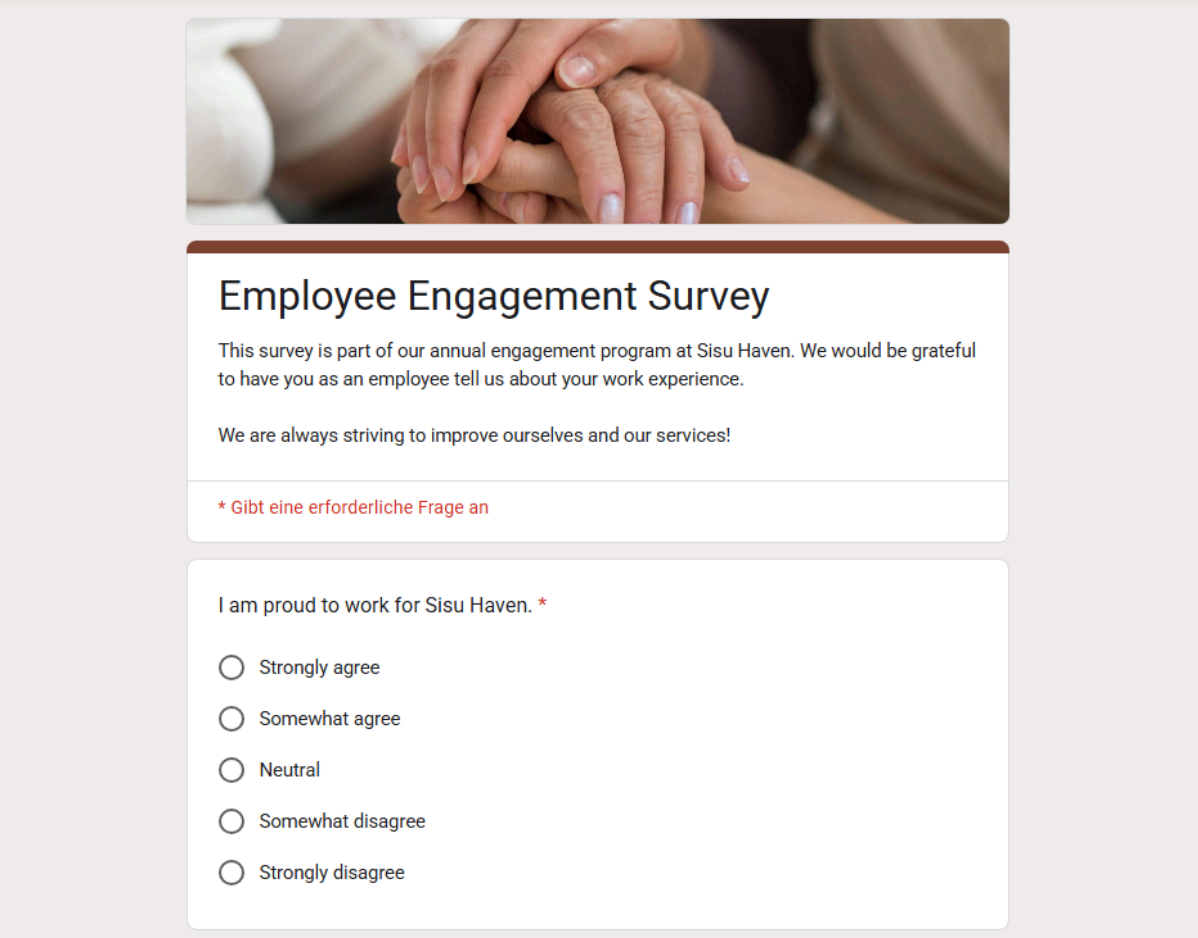
Spreadsheet 3: Employee Risk Chart

Based on their profile, we examined what risk factors could lead to a specific employee leaving, how high this risk is and what actions we can take to prevent them from wanting to leave. Additionally, we added a probability of leaving in percentage, which in a real-life data analysis would be conducted through a more precise probability model via machine learning for example. In our case however, we analyzed the employee's entire profile to make estimations based on their chances of leaving.

Next, we focus on the importance of employee engagement through the usage of surveys. Employee engagement surveys are a useful diagnostic tool that identify gaps in engagement. They give insight into employees' attitudes regarding their roles, leadership and work environment, which helps us address concerns before it is too late

The following pictures include screenshots of the employee engagement survey that was created through Google forms.

The link to the survey can be found here: <https://forms.gle/AgiNuP9HTvoteQxF7>



Employee Engagement Survey

This survey is part of our annual engagement program at Sisu Haven. We would be grateful to have you as an employee tell us about your work experience.

We are always striving to improve ourselves and our services!

* Gibt eine erforderliche Frage an

I am proud to work for Sisu Haven. *

☐ Strongly agree

☐ Somewhat agree

☐ Neutral

☐ Somewhat disagree

☐ Strongly disagree

Picture 37: Employee engagement survey

I know what I need to do to be successful in my role. *

- ☐ Strongly agree
- ☐ Somewhat agree
- ☐ Neutral
- ☐ Somewhat disagree
- ☐ Strongly disagree

There are adequate training programs and resources available to succeed in my role. *

- ☐ Strongly agree
- ☐ Somewhat agree
- ☐ Neutral
- ☐ Somewhat disagree
- ☐ Strongly disagree

I believe there are good career opportunities for me at Sisu Haven. *

- ☐ Strongly agree
- ☐ Somewhat agree
- ☐ Neutral
- ☐ Somewhat disagree
- ☐ Strongly disagree

I feel supported by my team members and / or supervisors. *

- ☐ Strongly agree
- ☐ Somewhat agree
- ☐ Neutral
- ☐ Somewhat disagree
- ☐ Strongly disagree

Pictures 38 and 39: Employee engagement survey

I regularly receive feedback on my work. *

- ☐ Strongly agree
- ☐ Somewhat agree
- ☐ Neutral
- ☐ Somewhat disagree
- ☐ Strongly disagree

The leadership at Sisu Haven contributes to its mission and values. *

- ☐ Strongly agree
- ☐ Somewhat agree
- ☐ Neutral
- ☐ Somewhat disagree
- ☐ Strongly disagree

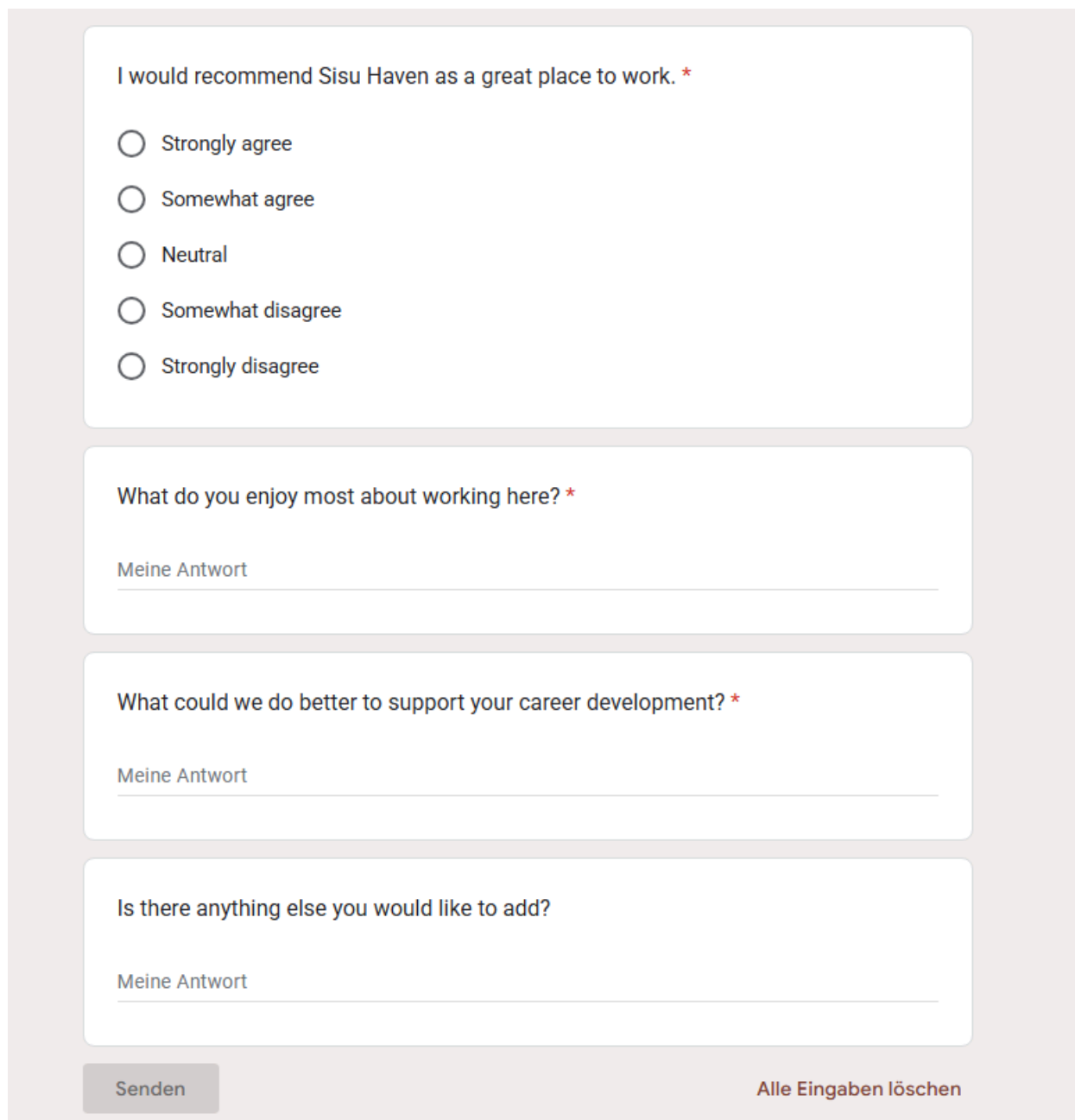
I understand how my work contributes to the mission and values of Sisu Haven. *

- ☐ Strongly agree
- ☐ Somewhat agree
- ☐ Neutral
- ☐ Somewhat disagree
- ☐ Strongly disagree

Sisu Haven fosters an open, supportive work environment. *

- ☐ Strongly agree
- ☐ Somewhat agree
- ☐ Neutral
- ☐ Somewhat disagree
- ☐ Strongly disagree

Pictures 40 and 41: Employee engagement survey



I would recommend Sisu Haven as a great place to work. *

☐ Strongly agree

☐ Somewhat agree

☐ Neutral

☐ Somewhat disagree

☐ Strongly disagree

What do you enjoy most about working here? *

Meine Antwort

What could we do better to support your career development? *

Meine Antwort

Is there anything else you would like to add?

Meine Antwort

Senden

Alle Eingaben löschen

Picture 42: Employee engagement survey

Another method of addressing challenges employees face is by conducting a 360-degree feedback. This form of feedback tracks progress over time and increases an organization's growth by aligning employees with organizational objectives. Furthermore, it boosts employee engagement and leadership success.

The 360-degree feedback for the position of a Certified Nursing Assistant can be designed this way:

360-Degree Feedback Certified Nursing Assistant

Employee name		Date	19.04.2025
Job title	Certified Nursing Assistant	Department	Nursing / Patient Care

Performance and Accountability			
Indicator 1	Delivers work on time and meets expectations	Rating	
Indicator 2	Demonstrates professionalism and attention to detail	Rating	

Team Collaboration			
Indicator 1	Works well with others and contributes to the team	Rating	
Indicator 2	Open to feedback from others	Rating	
Indicator 3	Willingness to support other staff members	Rating	

Patient Care			
Indicator 1	Shows empathy and respect towards patients	Rating	
Indicator 2	Performs procedures safely and accurately	Rating	
Indicator 3	Rigorously follows safety protocols and care plans	Rating	

Picture 43: 360-degree feedback for position of a Certified Nursing Assistant

Open-ended questions	
Question 1:	In which aspect(s) of my role do I perform well?
Answer:	
Question 2:	In which aspect(s) of my role could I improve, and how?
Answer:	
Question 3:	What advice do you have for me to help me improve my performance?
Answer:	

Feedback categories	
Communication skills	
Question:	How effectively do I communicate with colleagues and clients?
Answer:	
Teamwork capabilities	
Question:	How well do you think I collaborate with others in a team setting?
Answer:	

Acknowledgement and signatures					
HR contact person		Direct manager		Employee	

Picture 44: 360-degree feedback for position of a Certified Nursing Assistant

The 360-degree feedback for the position of a Facility Manager can be designed this way:

360-Degree Feedback Certified Facility Manager

Employee name		Date	19.04.2025
Job title	Facility Manager	Department	Administration and Operations

Performance and Accountability			
Indicator 1	Delivers work on time and meets expectations	Rating	
Indicator 2	Demonstrates professionalism and attention to detail	Rating	

Team Collaboration			
Indicator 1	Works well with others and contributes to the team	Rating	
Indicator 2	Open to feedback from others	Rating	
Indicator 3	Willingness to support other staff members	Rating	

Leadership			
Indicator 1	Demonstrates excellent leadership abilities	Rating	
Indicator 2	Makes informed and sound decisions based on problem-solving abilities	Rating	
Indicator 3	Motivates the team by mentoring members through feedback	Rating	

Picture 45: 360-degree feedback for position of a Facility Manager

Open-ended questions	
Question 1:	In which aspect(s) of my role do I perform well?
Answer:	
Question 2:	In which aspect(s) of my role could I improve, and how?
Answer:	
Question 3:	What advice do you have for me to help me improve my performance?
Answer:	

Feedback categories	
Communication skills	
Question:	How effectively do I communicate with colleagues and clients?
Answer:	
Teamwork capabilities	
Question:	How well do you think I collaborate with others in a team setting?
Answer:	

Acknowledgement and signatures					
HR contact person		Direct manager		Employee	

Picture 46: 360-degree feedback for position of a Facility Manager

Step 8: Performance Management

In this step, we will focus on optimizing and evaluating employee's performance. By aligning an employee's individual performance with our organization's goals, we can encourage opportunities for learning and growth. This is especially needed in a demanding work environment such as ours where providing quality care, being empathetic and professional are necessary skills. By managing performance we are able to differentiate between top performers and those who need to have gaps in their skillset addressed. Furthermore, we can increase employee engagement and consequently the retention of highly skilled employees.

Due to the differences in responsibilities and tasks, each role needs to have their criteria for evaluating performance modified. For this project, we will create a simple criteria list for the positions of a certified nursing assistant and a facility manager.

An analysis of the two tables below shows that while both roles share the same category of "professional conduct" due to their work environment, their respective responsibilities and performance metrics vary significantly. By creating a criteria list for each role, we can eliminate unclarity and create a meaningful performance evaluation.

Now, we need to determine how frequently the performance of our employees should be evaluated. To provide continuous feedback, it is important to conduct quarterly check-ins with our employees. This way we can learn what has been working and what needs to be addressed. On top of that, it is necessary to perform annual performance reviews with our HR department. The evaluation can be conducted by combining self-assessments from employees themselves and assessments from colleagues and supervisors in the form of a 360-degree feedback.

The following table provides a criteria sample for the role of a certified nursing assistant. The criteria are divided into five categories:

Criteria for evaluating the performance of a Certified Nursing Assistant (CNA)
Clinical Performance
<ol style="list-style-type: none"> 1. Patient care management: assists with daily living activities and reviews care plans 2. Ability to perform procedures accurately 3. Compliance with safety and health protocols 4. Patient satisfaction ratings
Professional Conduct
<ol style="list-style-type: none"> 1. Attendance and Punctuality 2. Adherence to facility policies 3. Willingness to learn from mistakes and setbacks 4. Organizes workload efficiently
Safety and Supply Management
<ol style="list-style-type: none"> 1. Adherence to established safety precautions 2. Maintains a clean and safe work environment 3. Reports defective equipment or supply needs immediately
Personal Skills
<ol style="list-style-type: none"> 1. Shows initiative 2. Acts warm and professional with colleagues and patients 3. Demonstrates integrity through alignment with the organization's values 4. Remains calm even in a crisis situation
Communication and Collaboration
<ol style="list-style-type: none"> 1. Ability to communicate professionally and efficiently with staff 2. Contribution to team goals through cooperation 3. Ability to communicate respectfully with patient and family 4. Actively seeks feedback from others

Table 1: Evaluation criteria for position of a Certified Nursing Assistant

This table provides a criteria sample for the role of a facility manager. The criteria are divided into six categories:

Criteria for evaluating the performance of a Facility Manager
Operational Performance
<ol style="list-style-type: none"> 1. Budget and Resource Management 2. Ability to optimize maintenance schedules 3. Ensures seamless facility operations through problem-solving skills 4. Contributes to the organization's strategic goals
Professional Conduct
<ol style="list-style-type: none"> 1. Attendance and Punctuality 2. Adherence to facility policies 3. Willingness to learn from mistakes and setbacks 4. Organizes workload efficiently
Safety and Compliance
<ol style="list-style-type: none"> 1. Maintains compliance with all health, safety and regulatory standards 2. Ensures a safe environment for staff and patients 3. Manages issues with equipment or supply needs immediately
Personal Skills
<ol style="list-style-type: none"> 1. Handles emergencies effectively 2. Ability to make decisions under pressure 3. Acts friendly towards staff and patients
Customer Service
<ol style="list-style-type: none"> 1. Ensures high levels of satisfaction among facility users 2. Manages relationships with service providers and other vendors 3. Ability to respond to feedback positively
Leadership and Communication
<ol style="list-style-type: none"> 1. Demonstrates excellent leadership skills 2. Ability to communicate with staff and executives 3. Encourages others to improve and grow 4. Strengthens team development

Table 2: Evaluation criteria for position of a Facility Manager

The performance evaluation for the position of a Certified Nursing Assistant can be designed this way:

Performance Evaluation Certified Nursing Assistant

Employee information			
Employee name	Julia Schulz	Department	Nursing / Patient Care
Job title	Certified Nursing Assistant	Manager name	Anya Dobrow
Last review date	11.12.2024	Review date	18.04.2025

Core competencies

Clinical Performance	Strongly disagree	Disagree	Agree	Strongly agree	Comments
Provides patient care management in an efficient manner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Performs necessary procedures safely and accurately	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Is compliant with all safety and health protocols	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Exceeds expectations in patient satisfaction ratings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Professional Conduct	Strongly disagree	Disagree	Agree	Strongly agree	Comments
Maintains regular and timely presence at work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Adheres to facility policies at all times	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Is willing to learn from mistakes and setbacks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Organizes workload efficiently	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Safety and Supply Management	Strongly disagree	Disagree	Agree	Strongly agree	Comments
Rigorously follows safety protocols	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Maintains a clean and safe work environment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Reports defective equipment or supply needs immediately	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Picture 47: Performance evaluation of a Certified Nursing Assistant

Job-related competencies

Personal skills	Strongly disagree	Disagree	Agree	Strongly agree	Comments
Shows initiative towards work-related tasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Builds strong relationships with colleagues and patients by demonstrating warmth and professionalism	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Demonstrates integrity by consistently aligning actions with organizational values	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Remains calm even in a crisis situation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Communication and Collaboration	Strongly disagree	Disagree	Agree	Strongly agree	Comments
Communicates professionally and efficiently with staff members	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Consistently contributes to the accomplishment of team goals through cooperation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Showcases respect and cultural sensitivity when communicating with patients and their families	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Actively seeks feedback from others	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Employee potential	Maximized	Growth within function	Promotable in the long term	Promotable in the short term
How would you qualify the employee's potential?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Areas of excellence	Points of improvement
•	•

Comments

Employee signature	
Reviewer signature	

Picture 48: Performance evaluation of a Certified Nursing Assistant

The performance evaluation for the position of a Facility Manager can be designed this way:

Performance Evaluation

Facility Manager

Employee information			
Employee name	Elif Yılmaz	Department	Administration and Operations
Job title	Facility Manager	Manager name	Minh Tran
Last review date	04.12.2024	Review date	18.04.2025

Core competencies

Operational Performance	Strongly disagree	Disagree	Agree	Strongly agree	Comments
Manages budget and resources of the organization efficiently	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Optimizes maintenance schedules to enhance operational productivity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Maintains seamless facility operations through proactive problem-solving	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Aligns daily operations with organizational objectives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Professional Conduct	Strongly disagree	Disagree	Agree	Strongly agree	Comments
Maintains regular and timely presence at work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Adheres to facility policies at all times	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Is willing to learn from mistakes and setbacks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Organizes workload efficiently	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Safety and Compliance	Strongly disagree	Disagree	Agree	Strongly agree	Comments
Maintains compliance with all health, safety and regulatory standards	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Ensures a safe environment for all staff members and patients	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Effectively deals with equipment issues or supply needs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Picture 49: Performance evaluation of a Facility Manager

Job-related competencies

Personal skills	Strongly disagree	Disagree	Agree	Strongly agree	Comments
Demonstrates exceptional crisis management skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Makes informed decisions under pressure by reliably assessing risks and priorities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Cultivates a welcoming environment through interaction with staff and patients	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Customer Service	Strongly disagree	Disagree	Agree	Strongly agree	Comments
Ensures high level of satisfaction among facility users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Handles relationships with service providers and other vendors on a professional basis	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Responds to feedback positively, using it as an opportunity to self-reflect	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Leadership and Communication	Strongly disagree	Disagree	Agree	Strongly agree	Comments
Demonstrates excellent leadership skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Openly communicates with staff and executives to bridge gaps in dialogue	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Mentors team members by providing constructive feedback	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Enhances team performance through trust-building activities and conflict-resolution strategies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Employee potential	Maximized	Growth within function	Promotable in the long term	Promotable in the short term
How would you qualify the employee's potential?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Areas of excellence	Points of improvement
•	•

Employee signature	
Reviewer signature	

Picture 50: Performance evaluation of a Facility Manager

After evaluating employees' performances, we need to focus on creating plans that allow for the growth of our employees. Performance management should not be seen as a mere tool that grades employees on how well they are doing, but rather provides them with an opportunity to learn. The first step of this process is to identify any gaps in skills to assess where an employee might need more support or training. Taking the responsibilities of a facility manager into account, if someone in this position receives feedback that their team doesn't feel acknowledged and supported, it could indicate that the manager needs further coaching in leadership to strengthen team engagement. Analyzing these gaps first is essential so we can develop a personalized plan that focuses on the employee's specific needs. Going back to the example of the facility manager, our plan would include the goal of improving leadership skills with a focus on team support and engagement. Next, we plan which steps this employee needs to take in order to reach their goal. This could be attending training sessions that focus on what it means to be an effective leader. We also need to take into consideration what support systems this employee might need, e.g. regular check-in meetings with team members to receive feedback and with a supervisor to track progress and improve unsuccessful measures. Lastly, the plan needs to be time-bound, meaning it needs to have a clearly defined timeline of when the goal should be achieved. For our example this could be to improve leadership skills through training sessions within the next quarter.

A coaching plan for this specific example could be designed this way:

Area of Coaching	Description	Frequency
Leadership Training	Complete a workshop on leadership and team management	Three week program, finished by the end of May
Team Engagement Practices	Weekly 1:1 meetings with team members to listen, support and give feedback to each other	Weekly basis for the next 12 weeks
Check-in session with Supervisor	Track coaching progress together Improve unproductive measures	Twice a week for the next 12 weeks

Table 3: Coaching plan

Step 9: Incorporation of Diversity, Equity and Inclusion (DEI)

The goal of this step is to incorporate diversity, equity and inclusion in all phases of the HR life cycle. Implementing DEI into our organization is a significant action that helps us build an inclusive work environment where all employees, no matter where they come from, can feel safe and welcome to contribute to our and their personal growth. Building diverse teams is especially important for organizations such as ours where patients come from all different kinds of backgrounds. Our goals are to improve the representation of a diverse staff, eliminate unconscious biases throughout the hiring process and encourage inclusive leadership.

To promote an inclusive hiring process, we will implement the following strategies: First, we design job advertisements that avoid gendered or biased language. Next, we actively source candidates from diverse talent pools. It is necessary to provide training about unconscious biases for our recruiters and to adopt structured interview techniques throughout the recruiting process to ensure fairness at all times.

Ensuring that new employees feel welcome is crucial to promote employee satisfaction and retention. Therefore, we focus on integrating new employees into their respective teams from the beginning by communicating team dynamics directly and scheduling regular check-in meetings with their supervisors. Another way of making employees feel more comfortable is by giving them the space to process everything new at their own pace and gradually increasing their responsibilities, e.g. working on smaller projects at first. From an organizational standpoint we can encourage equity by ensuring that our policies address aspects such as religious practices, family leave and gender-inclusive language.

Maintaining an inclusive work environment is a fundamental goal of our organization. To achieve this, we can develop practices that honor diversity on a daily basis: celebrating awareness days such as International Women's Day or World Mental Health Day for example can remind us of why certain groups of people still fight for equality and respect. Creating effective employee resource groups (ERGs) can provide further support, enhance employees' career development and strengthen their personal development in an inclusive environment.

Finally, it is necessary for us to assess equity during performance evaluations and career advancements. By tracking which individuals get promoted and questioning the reasons behind it, we can minimize unconscious biases and unfair treatment. This idea can be reinforced by standardizing evaluation practices and openly communicating the requirements for certain promotions.

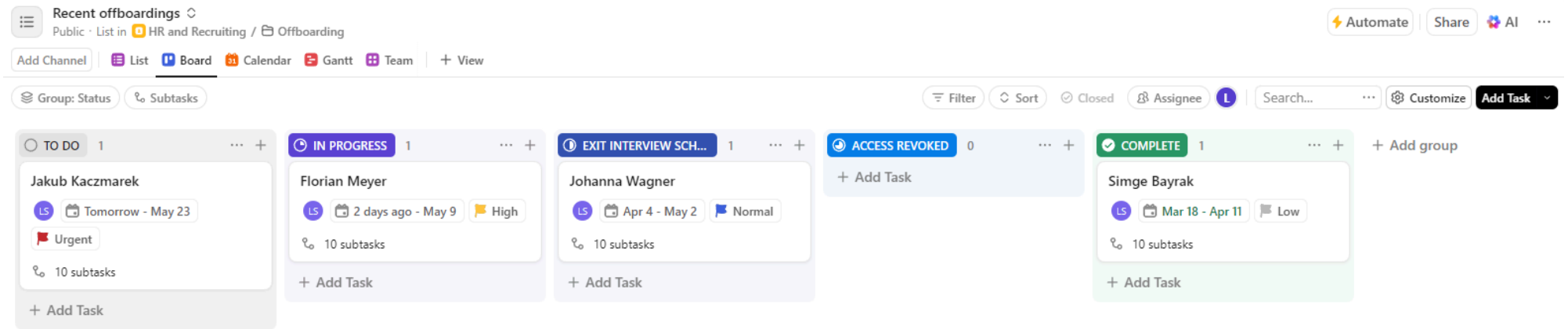
Step 10: Offboarding

The final step of the HR life cycle focuses on the offboarding process, which is beneficial for both employees and employers. A smooth offboarding experience enhances the employer brand since past employees are more likely to post positive reviews about their organization. On the other hand, incorporating exit interviews during this stage provides valuable feedback by giving insight into the team culture and potential issues regarding leadership and retention. In the end, a respectful and meaningful farewell demonstrates to employees that their contributions mattered, which in turn creates a positive work environment and encourages remaining employees to stay.

The offboarding process includes several essential tasks that need to be managed. First, we need to formally process the employee's termination and prepare all necessary documentation such as resignation letters, final paychecks and other benefits depending on the circumstances. Next, we need to notify relevant team members about the employee's leaving to ensure that tasks can be delegated to someone else if needed. The most important part of the offboarding process is the exit interview which can be conducted through a form or a one-on-one session. Topics to cover include reasons for leaving, job satisfaction, experiences with their respective team and management as well as suggestions for improvement. Following the interview, we need to focus on legal and administrative matters such as providing final compensation and other benefits such as pension if needed. It is also necessary to collect company assets such as uniforms, IDs and tech (computer/laptop, phone) and revoke access to these systems. Before parting ways with the employee, it is important to offer our farewell through a personal meeting or email, where we can express our gratitude for all of their efforts. Lastly, we need to carefully analyze the feedback we received from the exit interview to identify which areas need improvement.

The offboarding process can be visualized through another ClickUp board. For this example, we will have four fictional employees that recently left our organization due to various reasons and are at a different stage of the offboarding process.

The following picture displays a board view of recent offboardings:



Picture 51: Overview of the offboarding process

We can see that the four individuals who left our organization are in either one of these stages: the planning (to-do), in process, exit interview scheduled or completed.

The following pictures showcase examples of individuals who recently left our organization and the tasks we need to complete to process their offboarding:

Task ▾86c35g6ywAsk AI

Jakub Kaczmarek

Ask Brain to [write a description](#) · [create a summary](#) · [find similar tasks](#) · or [ask about this task](#)

Status

TO DO ▸ ✓

Dates

Tomorrow → May 23

Time Estimate

Empty

Tags

Empty

Assignees

LS

Priority

Urgent

Track Time

Add time

Relationships

Empty

Add description

Write with AI

10

LS 10 For me

Custom Fields

Exit interview status	To-Do
Last working day	May 23
Notes	Mr. Kaczmarek gave an early notice, IT department has started to prepare for his leaving
Reason for leaving	New position at a different organization
Role	IT Support

Picture 52: Employee Jakub Kaczmarek who is at the “to-do” stage

▼	○ TO DO	1	...	+ Add Task					
Name		Assignee	Due date	Priority					⊕
▼ ○ Jakub Kaczmarek	🔗 10	LS	May 23	🚩 Urgent					...
○ Receive resignation letter		LS	Tomorrow	🚩 High					...
○ Notify colleagues and supervisors		LS	Fri	🚩 High					...
○ Schedule exit interview		LS	Apr 30	🚩 Urgent					...
○ Prepare necessary paperwork		LS	Apr 30	🚩 Urgent					...
○ Conduct exit interview		LS	May 5	🚩 Urgent					...
○ Collect company assets		LS	May 23	🚩 Urgent					...
○ Revoke system access		LS	May 23	🚩 Urgent					...
○ Send farewell email		LS	May 23	🚩 Normal					...
○ Close all user accounts		LS	May 23	🚩 High					...
○ Analyze feedback from exit interview		LS	May 26	🚩 Urgent					...

Picture 53: Subtasks for the offboarding of Jakub Kaczmarek

Task 86c35gbzw Ask AI

Florian Meyer

Ask Brain to write a description · create a summary · find similar tasks · or ask about this task

Status	IN PROGRESS	Assignees	LS
Dates	2 days ago → May 9	Priority	High
Time Estimate	Empty	Track Time	Add time
Tags	Empty	Relationships	Empty

Add description

Write with AI

10

LS 10 For me

Custom Fields

Exit interview status	To-Do
Last working day	May 9
Notes	Mr. Meyer has started to delegate tasks to colleagues due to reduced working hours, offboarding process needs to be swift because of short notice
Reason for leaving	Relocation due to family obligations
Role	Courier

Picture 54: Employee Florian Meyer who is at the “in process” stage

IN PROGRESS 1 ... + Add Task					
Name	Assignee	Due date	Priority		
<div> <div></div> <div>Florian Meyer</div> <div>10</div> </div>	LS	May 9	High		
<input type="radio"/> Receive resignation letter	LS	2 days ago	Low		
<input type="radio"/> Notify colleagues and supervisors	LS	2 days ago	Low		
<input type="radio"/> Schedule exit interview	LS	Tomorrow	Urgent		
<input type="radio"/> Prepare necessary paperwork	LS	Wed	Urgent		
<input type="radio"/> Conduct exit interview	LS	Apr 28	Urgent		
<input type="radio"/> Collect company assets	LS	May 9	Urgent		
<input type="radio"/> Revoke system access	LS	May 9	Urgent		
<input type="radio"/> Send farewell email	LS	May 9	Normal		
<input type="radio"/> Close all user accounts	LS	May 9	High		
<input type="radio"/> Analyze feedback from exit interview	LS	May 13	Urgent		

Picture 55: Subtasks for the offboarding of Florian Meyer

Task 86c35gd5y Ask AI

Johanna Wagner

Ask Brain to write a description · create a summary · find similar tasks · or ask about this task

Status EXIT INTERVIEW SCHEDULED ✓

Assignees LS

Dates Apr 4 → May 2

Priority Normal

Time Estimate Empty

Track Time Add time

Tags Empty

Relationships Empty

Add description

Write with AI

10

LS 10 For me

Custom Fields

Exit interview status	Scheduled
Last working day	May 2
Notes	Ms. Wagner submitted her resignation at the beginning of April, the exit interview is scheduled for April 25
Reason for leaving	Reorientation to a different career path
Role	Certified Nursing Assistant

Picture 56: Employee Johanna Wagner who is at the “exit interview scheduled” stage

EXIT INTERVIEW SCHEDULED 1 ... + Add Task					
Name	Assignee	Due date	Priority		
<div> <div></div> <div>Johanna Wagner</div> <div>10</div> </div>	LS	May 2	Normal		
<input type="radio"/> Receive resignation letter	LS	Apr 4	Low		
<input type="radio"/> Notify colleagues and supervisors	LS	Apr 8	Low		
<input type="radio"/> Schedule exit interview	LS	6 days ago	Low		
<input type="radio"/> Prepare necessary paperwork	LS	Tue	High		
<input type="radio"/> Conduct exit interview	LS	Fri	Urgent		
<input type="radio"/> Collect company assets	LS	May 2	Urgent		
<input type="radio"/> Revoke system access	LS	May 2	Urgent		
<input type="radio"/> Send farewell email	LS	May 2	Normal		
<input type="radio"/> Close all user accounts	LS	May 2	High		
<input type="radio"/> Analyze feedback from exit interview	LS	May 8	Urgent		

Picture 57: Subtasks for the offboarding of Johanna Wagner

Task 86c35gdt7 Ask AI

Simge Bayrak

Ask Brain to write a description · create a summary · find similar tasks · or ask about this task

Status **COMPLETE**

Assignees **LS**

Dates Mar 18 → Apr 11

Priority Low

Time Estimate Empty

Track Time Add time

Tags Empty

Relationships Empty

Add description

Write with AI

10

LS 10 For me

Custom Fields

Exit interview status	Complete
Feedback score	★★★★★
Last working day	Apr 11
Notes	Were able to provide a smooth offboarding for Mrs. Bayrak and celebrated her leaving, which she was very happy about
Offboarding complete?	<input checked="" type="checkbox"/>
Reason for leaving	Retired
Role	Facility Manager

Picture 58: Employee Simge Bayrak who finished the “complete” stage

Subtasks 0/10 10 Assigned to me

Name	Assignee	Priority	Due date	
<input type="radio"/> Receive resignation letter	LS	Low	Mar 18	
<input type="radio"/> Notify colleagues and supervisors	LS	Low	Mar 18	
<input type="radio"/> Schedule exit interview	LS	Low	Apr 1	
<input type="radio"/> Prepare necessary paperwork	LS	Low	Apr 3	
<input type="radio"/> Conduct exit interview	LS	Low	Apr 7	
<input type="radio"/> Collect company assets	LS	Low	Apr 11	
<input type="radio"/> Revoke system access	LS	Low	Apr 11	
<input type="radio"/> Send farewell email	LS	Low	Apr 11	
<input type="radio"/> Close all user accounts	LS	Low	Apr 11	
<input type="radio"/> Analyze feedback from exit interview	LS	Low	2 days ago	

Picture 59: Subtasks for the offboarding of Simge Bayrak

Step 11: Conclusion

The overall goal of this project was to track the entire HR life cycle from strategic planning to the process of offboarding. To highlight the relevance of this project, every task was customized to the example of a fictional private health facility named Sisu Haven that provides outpatient care to the elderly. First, we analyzed our organization from the outside to get a better understanding of what our mission, vision and values (MVV) are. Next, we conducted a workforce analysis to align HR practices with our main objectives and goals so we can design a job analysis and job description for the positions of a Certified Nursing Assistant and a Facility Manager. In order to attract talented candidates, we tracked each one of them through a hiring pipeline and proactively sourced for qualified individuals using job boards and social media sites such as LinkedIn. Before concluding the recruitment process, we incorporated effective interviewing and evaluation strategies by tailoring them to each specific role. Then, we created a detailed onboarding plan for the first 90 days of a new employee which included pre- and post-onboarding tasks as well.

To measure employee engagement, we implemented several tools such as risk charts, engagement surveys and 360-degree-feedback. The results of these questionnaires suggested which employees were at risk for leaving and which factors played into that hypothetical decision.

Following this, we focused on optimizing and evaluating employee performance by assessing the necessary criteria for each of the roles from our example so we can design a simple coaching plan. By integrating diversity, equity and inclusion (DEI) throughout every step of the HR cycle, we were able to create an open and supportive work environment for our employees. This included policies for inclusive hiring and assessments regarding equity of leadership positions. Finally, we emphasized the importance of including offboarding into the HR life cycle and how it affects employers and employees.

The various tools and templates that were used throughout this project turned the theoretical framework of HR processes into a more practical and creative approach. ClickUp was incredibly helpful to visualize and organize different processes of the HR cycle such as candidate pipelines, onboarding and offboarding. Excel was briefly used to conduct our workforce analysis and to organize important employee data. Google Forms provided a structured way of designing effective surveys regarding onboarding and employee engagement. Lastly, we built personalized templates for a job advertisement, performance evaluation and 360-degree feedback by using inspiration from existing online templates.

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