

UCSF'S ADMINISTRATIVE LEAN PROCESS PILOT – EMPLOYEE ONBOARDING

SUMMARY

UCSF's Medical Center has been applying lean principles to clinical operations for several years, resulting in many great process improvements. In 2014 a pilot was launched to evaluate the effectiveness of applying lean principles and process improvement strategies to UCSF's administrative processes. The pilot focused on the "new employee onboarding" process and has resulted in increased customer satisfaction, cost savings, and fewer defects.

ABSTRACT BRIEF

New employee onboarding was selected as a lean pilot for several reasons. First, the process involved multiple individuals and departments within the organization, including but not limited to: HR, IT, Security, and department hiring supervisors. Having many handoffs within the process was a source of frustration for supervisors who wanted an experience that felt more like "one stop shopping". Second, newly hired employees felt that they were not getting much of an orientation to the organization on their first day at UCSF. Third, onboarding is a high volume activity at UCSF with well over 3000 staff and faculty hires each year.

During the initial value stream mapping event a team of cross functional service providers from HR, IT, Facilities, and Security worked with supervisors and recent new hires to map the process (*photo 1*) and better understand where value was added and where the process included waste. The team identified over 100 discrete steps in the process and a typical lead time of approximately 17 days, of which only about 0.67% of the time was value added activity. With an improved understanding of the process—including delays and defects—the team identified four areas that would become the focus of future kaizen workshops, including: Each kaizen event lasted four days and included a mix of subject matter experts and customers. The teams employed data and direct observations of the process to develop improvement ideas that ranged from small to large.



Photo 1 - Value Stream Map



Photo 2 - October 2014 Value Stream Mapping Team

MILESTONES

July 2015

- Automated Account Creation Tool Launched

June 2015

- Electronic Onboarding Pilot Launched

May 2015

- Kaizen Workshop 4 – IT Account Setup

April 2015

- Kaizen Workshop 3 – Onboarding Session Content
- New "Door Access" IT Ticket Launched

January 2015

- Kaizen Workshop 2 – Onboarding Paperwork

November 2014

- Kaizen Workshop 1 – Door Access

October 2014

- Value Stream Mapping Workshop (*photo 2*)

PROJECT TEAMS INCLUDED REPRESENTATIVES FROM:

Human Resources

IT Services

Police and Campus Security

Facilities Services

Hiring Department Representatives

University Relations

Campus Life Services

Program Management Office
(facilitation & implementation support)Rona Consulting Group
(external lean consultants)Department Managers
(the customer)

One example of a highly effective change resulting from the new hire badge kaizen was to bring the ID badge machine to the new employee onboarding location, eliminating the need for new hires to travel to a separate campus location to get an ID badge. This change was simple and inexpensive to implement as a result of the collaboration between Security and HR facilitated during a lean kaizen event. Another example that highlights the effectiveness of lean tools and techniques within a complex organization is the collaboration between HR, Campus Life, and University Relations to enhance the relevance and quality of information presented to new hires during their first day. As a result of the team's work, survey-based ratings from new hires have risen from 2.7 to 4.7 out of 5 points.

Some improvement ideas required significant implementation work after the kaizen events due to technical requirements for system integration or new IT development. For ideas that required substantial post-kaizen work, detailed implementation plans and specifications were drafted by the teams during kaizen to ensure that improvement ideas were well documented and that implementation teams could meet the desired goals.

FISCAL YEAR 2015 ONBOARDING KAIZEN EVENTS

- New hire badges and door access
- New hire forms and paperwork
- First day onboarding meeting with Human Resources
- New hire system access and accounts

QUANTIFICATION AND RESULTS

Reduced overall lead time by up to 9 days per onboarding.

Reduced number of pages manually filled out at onboarding from 65 to 3 per onboarding (saving approximately 186,000 sheets of paper per year).

~95% reduction in time required for manual IT account creation.

Improved customer satisfaction with onboarding session from 2.7 to 4.7/5 (as measured by surveys collected from new hires on day one).

~3,000 fewer shuttle trips to pick up ID badges.

OPPORTUNITIES AND SOLUTIONS

There are still many improvements that can be made to the onboarding process at UCSF, we're really just beginning to act on the opportunities that the lean process has helped to highlight. In the coming year the kaizen events will shift to related upstream processes; recruitment, selection, and visas. However, efforts are underway to implement regular team process reviews to continue refining the onboarding process.

IMPACT AND BENEFIT

Altogether, when fully implemented, the improvement ideas generated throughout the project will reduce onboarding lead-time from 17 days to eight. It has not yet been possible to measure the reduction

in defects, but customer feedback indicates that they have noticed improved accuracy as a result of the lean process work. Based on the results of the onboarding pilot, UCSF is expanding investments in administrative process improvement work using lean principles and techniques.

LESSONS LEARNED

- 1 Anticipate the need for post-kaizen implementation work when it comes to administrative processes. Create a clear, detailed implementation plan for improvements that need to be completed outside the workshop.
- 2 Be creative in finding ways to observe the administrative process. You may need to do demonstrations or simulations for the team so that they can see all the steps that typically take days to complete.
- 3 You can't always define a single customer when it comes to university administrative processes. In many cases you'll have to think about value through the eyes of multiple customers/stakeholders.
- 4 Make the process work (and successes) visible to help ensure standard work and team commitment to continuous improvement. One effective strategy for communicating changes is to create a process visibility wall (*photo 3*).

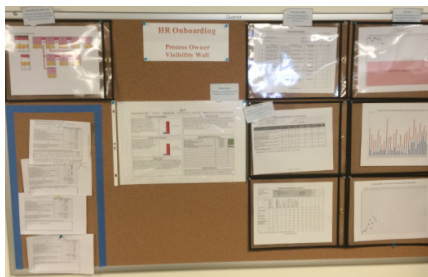


Photo 3 - Onboarding process visibility wall (displayed publicly in the HR lobby)