Initial Onboarding: Smartsheet Training Dashboard

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Background

The Clinical Research Education Program continues to refine the process of tracking individual trainees' initial onboarding progress. Two full-time trainers maintain data about each training encounter in a Smartsheet called the "All-Trainee Tracker" (ATT), and Tableau is used to generate program-wide metrics.

Previously, trainers entered data:

- Into each trainee's individual page in OneNote, which then had to be transcribed into the ATT. This created duplicative work.
- We then captured data in an Excel spreadsheet embedded within each OneNote, which allowed data to be copied/pasted into the ATT. OneNote syncing and access issues were problematic with this approach.
- We then evolved to maintaining individual trainee trackers within Smartsheet. This allowed real-time collaboration between the trainers and easy transcription into the ATT. The Smartsheet could be shared with relevant study team members, such as the trainee, their onboarding coach (OC), and their manager.

Now we are leveraging Smartsheet to create personalized dashboards for each trainee, to further streamline tracking and enhance the training experience.

Goals

1. Track progress across all training topics, while distinguishing progress for Foundational and Core (role-related) topics.
2. Highlight small wins along the trainee's journey.
3. Centralize communication for the trainers, the trainee, and their relevant team members.
4. Streamline and automate education administrative tasks.

Solutions and Methods

We developed a Smartsheet dashboard utilizing reports generated from a trainee's individual Smartsheet tracker.

Reports include:

- Illustrating completion percentage for topics overall, foundational topics, and core topics.
- Summarizing all training sessions to date and topics covered.

The dashboard includes a link to a training request form that the trainee, their OC, or manager can use to request review of a specific topic or help with a certain project.

Outcomes

1. Direct feedback from the trainers is crucial to understand the administrative burden and functionality of the dashboard. Their feedback will shape automating administrative tasks.

2. As we personalize and celebrate milestones, we hope that trainees feel more supported and engaged in their learning journey. As education opportunities arise, trainees and their team can quickly identify topics needing additional review. To understand how these changes impact the onboarding experience, the Onboarding Satisfaction Survey will be updated to include questions specific to the usefulness of the dashboard and training request form. To assess engagement, we will ask how often team members interact with the dashboard and for what purpose (e.g., requesting review of topics, checking on completion status).
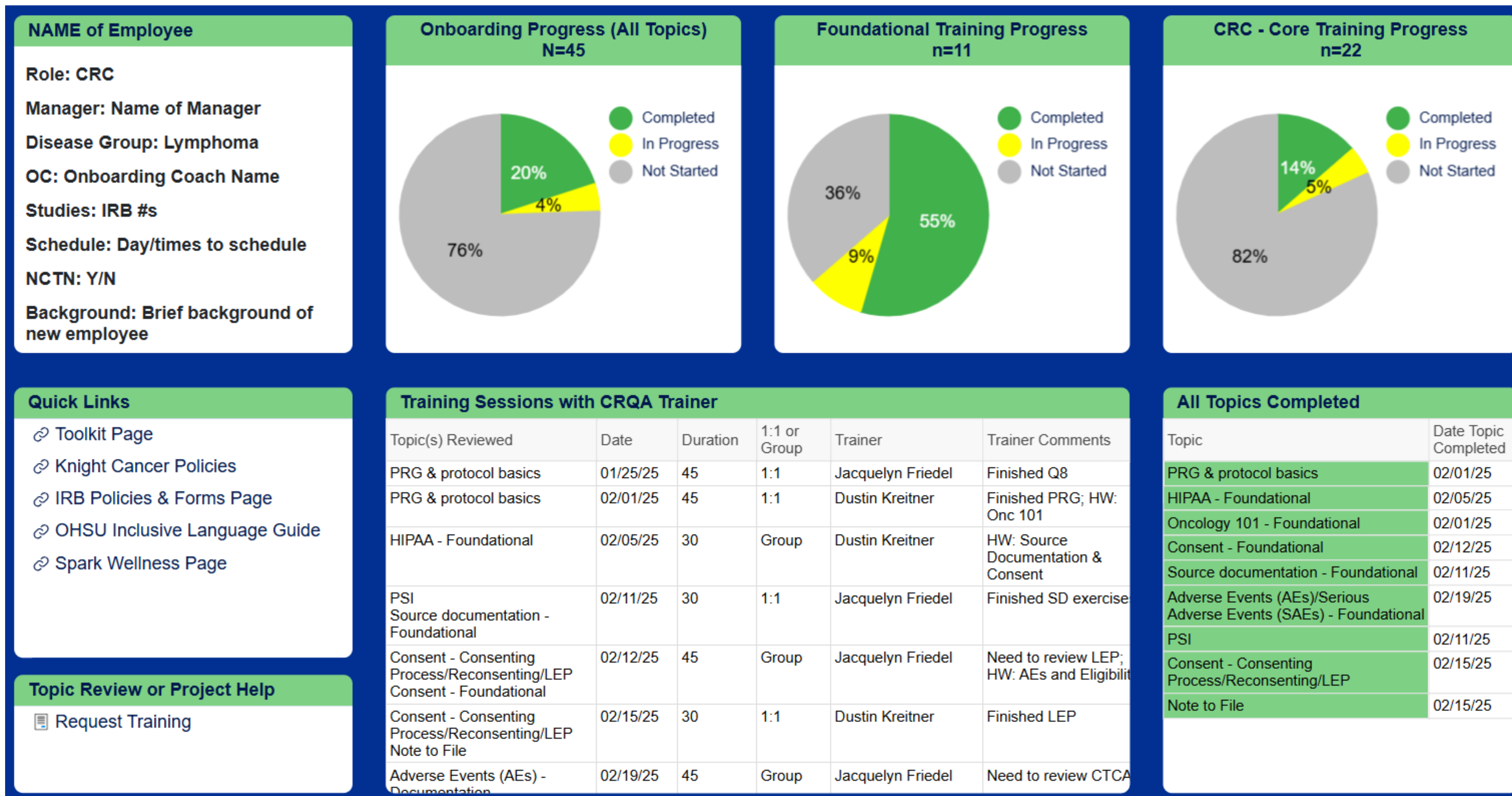
Lessons Learned and Future Directions

Tracking onboarding progress is labor-intensive, but technology can create efficiencies while also enhancing and simplifying data visualization.

One future iteration planned for the dashboard is to add references and links reviewed during training for each topic.

Looking further ahead, the dashboard will be shaped by user needs and evaluation of technological enhancement capabilities, including evaluating the use of linking Smartsheet with Microsoft Teams to increase communication and engagement.