

Turning Complexity into Competency: Implementing a Structured Onboarding Framework for Clinical Trial Activation

T. Lannon, A. Voorhees

Moffitt Cancer Center

1. Background

Clinical trial activation at Moffitt Cancer Center is a long, multistep process, making training new team members challenging. Following team centralization in 2021, onboarding consisted of two weeks of lecture-heavy sessions, ad hoc shadowing, and policy review before new staff were assigned trials. This approach prolonged daily supervisory time during onboarding. Concerns regarding inconsistent staff performance, low confidence, and retention rates created the need for a structured onboarding program capable of improving new staff knowledge, skills, and confidence.

2. Goals

Improve knowledge and skill acquisition, retention, and confidence within the clinical trial activation role through a structured, measurable, competency-based 90-day onboarding framework that leads to functional independence within three to six months.

3. Solutions and Methods

In June 2023, leadership reviewed existing resources, feedback, and instructional practices, including “I do, We do, You do” and “See one, Do one, Teach one”, to develop a phased, blended-learning onboarding program supportive of diverse learning styles and built on demonstrated skills. The framework intentionally preserves training quality by slowing down onboarding.

Phase one (weeks one to four) provides foundational training through eight core and fifteen supplemental videos totaling eleven hours of instruction, daily check-ins with leadership, guided policy review, shadowing chronologically aligned to the activation workflow, deliverables practice, and verbal and written teach-back assessments for feedback. Practice incorporates trials from current staff for meaningful skill application and building team cohesion.

Phase two (weeks five to 12) integrates staff into a disease program using trial assignments conducted through leadership guidance and an assigned peer mentor. This phase includes continued shadowing, frequent check-ins, and competency sign-off.

Core competencies were based on the activation roles and responsibilities and mapped to training objectives within a phased onboarding checklist. Objectives align with measurable outcomes such as feasibility survey completion, meeting facilitation, operational setup, quality review, and template creation. Competency progress is tracked collaboratively by the trainee and supervisor.

4. Outcomes

Since January 2024, eight new team members have completed onboarding under the new framework.

- All were retained beyond three months. Six remained beyond one year with two currently in their first year. Three departed after an average of one and a half years
- Six met or exceeded expectations on process explanation assessment during phase one
- Five met expectations on template development upon first attempt
- Five received consistent positive feedback from assigned programs regarding performance
- Five achieved functional independence within three to six months

Trainees reported that combining multiple learning methods with on-demand videos supported understanding of complex processes, reduced monotony, and strengthened comprehension of the workflow. Feedback noted improvement needs in resource organization and early informational load management.

Leadership effort during the first two weeks decreased by seven hours; however, time was redistributed to more frequent check-ins in weeks three and four. Peer mentor involvement varied considerably, ranging from minimal to twenty hours per week.

5. Lessons Learned and Future Directions

A phased, blended-learning onboarding framework demonstrated benefits for skill development and long-term performance; however, outcomes highlight the need to minimize information burden and support efficient learning. Future efforts will prioritize implementing a central learning platform, expanding competency-based continuing education, and establishing a structured mentorship program.