

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



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## 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, which led to prolonged daily leadership unavailability for day-to-day responsibilities.
- Concerns regarding retention, inconsistent staff performance, and low confidence created a need for a structured onboarding program to improve new staff knowledge, skills, and confidence.

## 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.

## Solutions and Methods

- June 2023: Reviewed existing resources, feedback, and instructional methods to develop a phased, blended-learning program supportive of diverse learning styles and built on demonstrated skills, intentionally preserving training quality by slowing down onboarding.

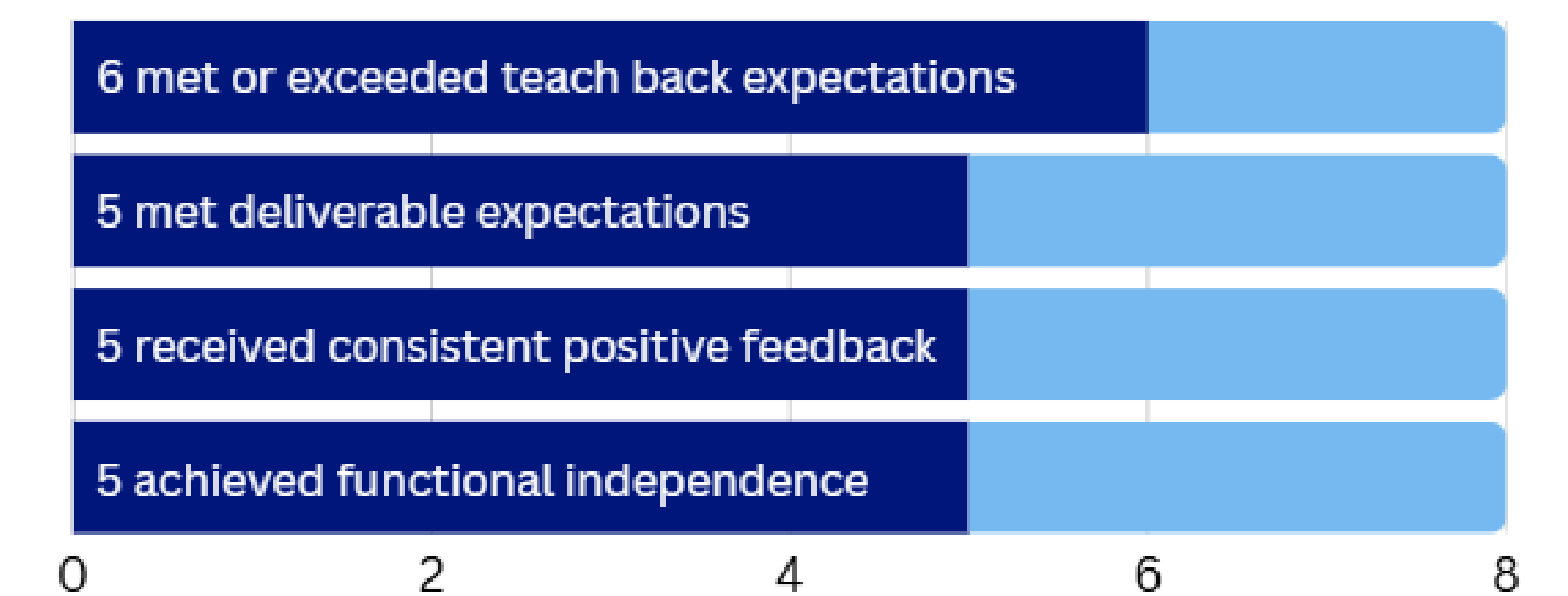
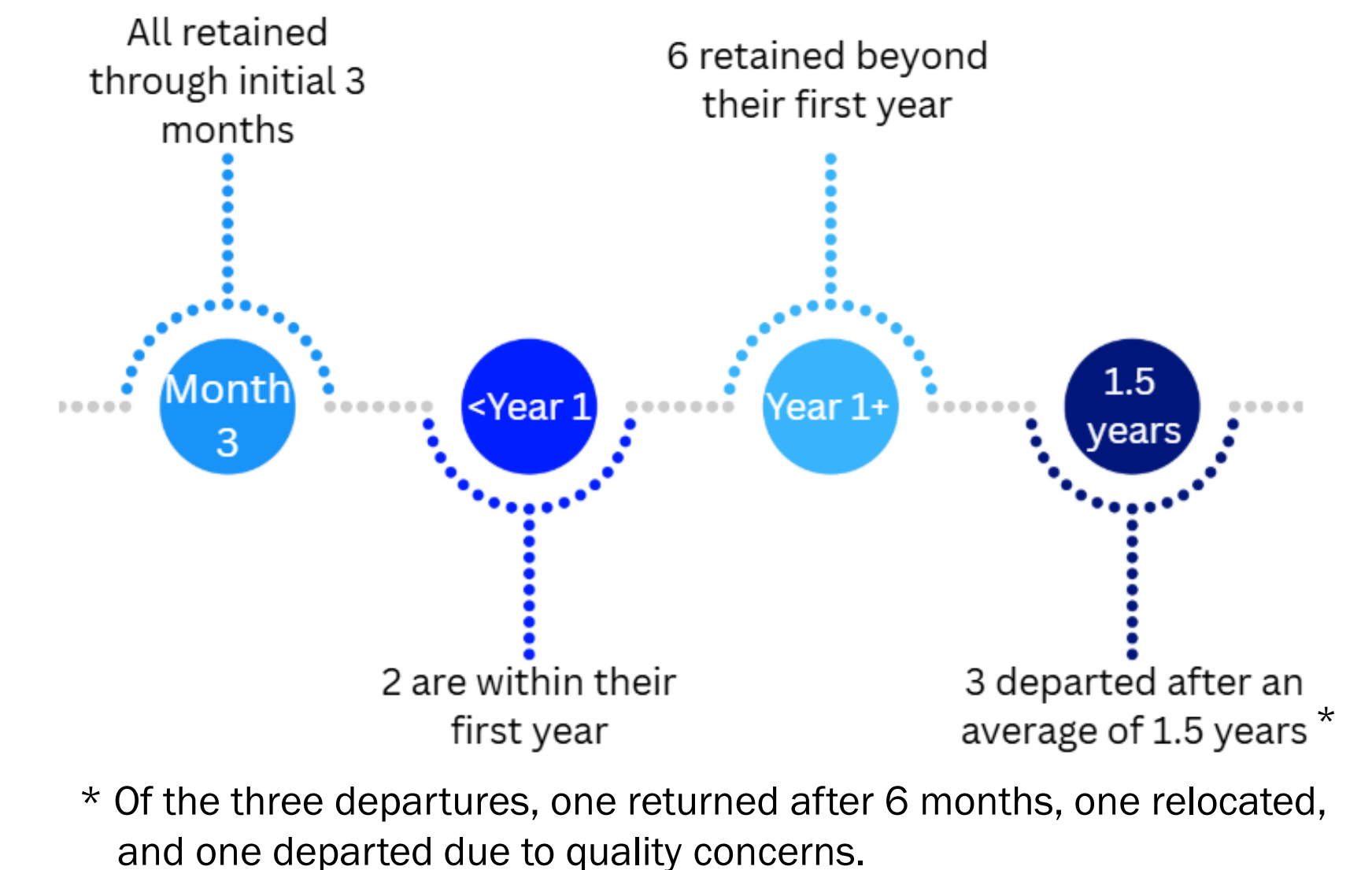
Phase 1: Foundational Training	Phase 2: Program Integration
Weeks 1-4	Weeks 5-12
<ul style="list-style-type: none"> <li>· Eight core and 15 supplemental videos totaling eleven hours of instruction</li> <li>· Daily check-ins with leadership</li> <li>· Guided policy review</li> <li>· Shadowing chronologically aligned to the activation workflow</li> <li>· Deliverables practice from current trial work for meaningful skill application</li> <li>· Verbal and written teach-back assessments for feedback</li> </ul>	<ul style="list-style-type: none"> <li>· Trial management conducted with leadership guidance and peer mentorship</li> <li>· Continued shadowing, regular check-ins, and competency sign-off</li> <li>· Competencies mapped to training objectives that aligned with measurable outcomes such as feasibility survey completion, meeting facilitation, operational setup, quality review, and template creation</li> </ul>
Progress guided and documented within an onboarding checklist.	

## Outcomes

- Trainees reported combining multiple learning methods with on-demand videos supported understanding of complex processes and reduced monotony.
- Feedback noted improvement needs in resource organization and early informational load management
- Leadership effort during first two weeks decreased by seven hours; however, time was redistributed to more frequent check-ins during weeks three and four
- Peer mentor involvement ranged from minimal to twenty hours per week

## Outcomes

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



## Refinements and Next Steps

- A phased, blended-learning onboarding framework demonstrated benefits for skill development and long-term performance; however, there is a 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.