

Boise State University

**ScholarWorks**

---

MDS/BAS 495 Undergraduate Capstone  
Projects

Student Research

---

Spring 2022

## How to Improve an Existing Training Program

Joseph Morgan

*Boise State University*

---

## **How to Improve an Existing Training Program**

Joseph Morgan

Multidisciplinary Studies, Boise State University

### Author Note

Joe Morgan, Multidisciplinary Studies Student at Boise State University

Contact information: [joemorgan@u.boisestate.edu](mailto:joemorgan@u.boisestate.edu)

### Abstract

Increasing the effectiveness of any training program is an ongoing undertaking that may require refinement year after year. The purpose of this MDS Capstone Project is to increase the effectiveness of our agent community, as well as our internal staff, when it comes to identifying missing information during the implementation process of a new group that is being on-boarded for health insurance. Missing information, errors, and inaccurate information can lead to delays when on-boarding a new group. These delays may also lead to increase workloads, increased cost through employee's having to work overtime, and upset customers. Restructuring this training program, in order to create a new and innovative approach, involved input from many sources that helped to produce a flexible platform which can be augmented to suit the ever changing health insurance landscape.

Our company will have a new training program that can be used for years to come. This training program is scalable to fit almost any audience, and can be adjusted easily for changes that impact the health insurance landscape year after year. Implementing a streamlined training will allow our organization to cut down on the time it takes to on-board a new group, while at the same time saving valuable resources and expense long the way.

*Keywords:* Refinement, Innovative, Streamlining

### **Introduction to your Capstone Project**

In order to process a new group for health insurance, the paperwork to set that group up must be complete and accurate. Currently our health insurance company has an outdated group implementation training program that has led to countless errors on paperwork, which has resulted in delays during the onboarding process for groups. These errors also have an impact to our bottom line in that our internal processing teams must work overtime to identify the errors, work with our external broker partners to have them corrected, and then complete the onboarding process. Delays during the onboarding process can impact our customers who may need timely prescriptions, or may have a surgery that needs to be rescheduled due to these errors.

Our company needs to improve the onboarding process of new groups in order to ensure we are taking care of our customers in a timely manner. To address this, I will be focusing on the implantation of an updated training program that will focus on improving the quality of the paperwork that is submitted. The goal of this updated training program is to cut down on the amount of errors, which will cut down on implementation time.

### **Section 1: Innovative Approach**

At the moment, our training program does not meet the expectations of our customers as it is not comprehensive enough to assist in shortening the length of time it takes to onboard a new group. Either, utilize vast resources and personnel to expand our group onboarding training courses and processes, in order to make them more efficient, or upgrade our internal staff and broker educational materials, as well as training courses, so that they can easily onboard groups, thus decreasing the number of errors that cause delays in the onboarding process.

I started by sending out surveys and conducting phone interviews, with both internal staff and our broker community in order to understand the varying opinions on how to best implement a new training program. These new perspectives will allow me to better understand the current state of our training program, and develop a more collaborative approach which encompasses a broader stakeholder base. I will also be looking to utilize some of our internal data sources, as well as management input, in order to establish a baseline from which to gauge the success of our new training program.

Our current training program was created a few years back, by individuals that have no stake in the success of onboarding new groups. Incorporating stakeholder input is something new to our organization, and may lead to additional changes for future project improvements in other areas. Having an outside perspective on a process, may enable us to think of new and innovative ways of maximizing our resources, while at the same time, cutting down on implementation time for new groups.

I relied heavily on a few sources that were centered around project management which I found online. These sources include The Harvard Business Review, The Society for Human Resource Management, Northeastern University. Our project management team has provided some exceptional insights as to how they work through setting up their training programs, as well as insights on how to best get feedback from stakeholders. Using these resources, I should be able to create a training program that suits a majority of our stakeholders.

## **Section 2: Emotional Intelligence**

Our companies preferred method of collecting data is through the process of sending out surveys, and so I created a survey for this project in accordance with our company's best practices. I quickly found out that having stakeholders simply answer survey questions was

not as productive as having a conversation with them, as they would provide short answers which contained very little detail or analysis of the questions being asked. After the first two surveys came back, it was clear to me that I was not connecting with my stakeholders to the level in which they understood what I was asking for. I quickly pivoted to set up meeting times so that I could hold one on one calls with my stakeholders where I have received some amazing feedback, as well as answers that have aided me in updating our training program. I have learned that I myself need to work on my listening skills, and ask questions that have substance.

Each stakeholder is dynamic in their own way, which the survey's did not allow to be captured. Since holding physical phone calls with these stakeholders, I have been able to draw out what is really important to each individual, and what it is that they hope to achieve during training. I have also been able to evolve my questions so that I can build upon their response and dive deeper into what matters most to each person. While surveys are a great way to assess where people are at with respect to a particular topic, they do not allow for dialog that may be even more powerful or allow the stakeholder the ability to provide an honest answer due to time constraints.

### **Section 3: Creative Thinking**

In order to understand how I should approach my Capstone project, I had to identifying who the stakeholders were, gathering constructive feedback, and use that information to sculpt a new way of organizational thinking. Looking at our current process from an insider's perspective has been challenging as it is difficult to see where our flaws lie. According to the Harvard business review, "To increase the project's chances of success, you must look beyond the symptoms you have observed" (HBR Editors, 2016). Bringing in other stakeholders allowed me to truly see the scope of the problem at hand, as well as helped to generate ideas, processes,

and develop a training program that will have a lasting impact on our organization. The most time consuming portion of this process has been analyzing the data that we currently have, as well as understanding what other stakeholders wanted to see changed, as it relates to our current training program. Our conversations allowed them to feel as though they were part of making a difference in how we operate, and I received some amazing feedback due to that newly found sense of respect between us. I stepped out of my comfort zone and challenged my peers to provide feedback that truly could allow us all to succeed. This has been a new experience for me, as well as most of my stakeholders who have really never been asked what they thought of our training program.

While my approach may not be unique to a lot of organizations, it is new to our organization as well as my department in general. Traditionally we have simply let management dictate who the stakeholders are, the process, and the analysis. Management may not have a full understanding of their decisions when they are making them. My approach takes into consideration the stakeholders that have been overlooked and that can see where we have opportunities to fix a system that has not been updated in years. After showing management the results of my phone interviews, they realized that a change needed to be made. It was determined that I should be focused on training the brokers and the Sales and Service Coordinators (SSC).

#### **Section 4: Your Innovative Solution**

Our current training program is not adequate enough to help stakeholders minimize the amount missing information on forms that are submitted, and each question that is missed can cause delays during the onboarding process of a new group. In order to prepare for this project, I had to first understand what our company's current training program entails, what the strengths of that training program are, and what weaknesses were apparent. I was then able to

prepare a training program that I could use to help our stakeholders understand how even the smallest detail can have an impact on effectively implementing a new group. This approach has the potential to improve our implementation timeframe, get ID cards out to members quickly, and increase our brokers understanding of what is needed when implementing a new group.

In my department we have not addressed our training platform for many years, even though our processes and procedures have changed over time. The innovation behind this new training program will be new training content, as well as we will be implementing a fixed training update schedule where we will review content on a bi-yearly basis. This will help to ensure we can stay on the cusp of any changes that may need to be communicated to all of our stakeholders, including myself. According Arte Nathan, with the Society for Human Resource Management, “Companies want happy employees, so consider a “life-long training” philosophy that focuses on employee satisfaction” (Nathan, 2016). Our employees, as well as our brokers, can benefit from our yearly or bi-yearly updates to our program, which may lead to a happier workforce over time.

### **Section 5: Results**

By updating our existing training program, so that it is more in line with how we operate today, has allowed our stakeholders to grow their knowledge base and created an environment of learning. The stakeholders have been able to learn how their actions can have an impact during the onboarding process. The benefits of this new training program include a more knowledgeable broker community that understands the value of submitting documents that are complete and accurate, and has the tools and resources that can assist them during the onboarding process. During my follow-up conversations with my stakeholders, they informed me that they came out of the training knowing a lot more about what actually could stall the

process then they did going into it. During the follow-up conversations, my stakeholders expressed that having that knowledge will allow them to be more effective in their roles when it comes to onboarding a new group.

The impact to our stakeholders has been positive overall. During the follow-up conversations I learned that the training opened up their eyes as it included items that are commonly missed and that should have been communicated to them over the years, but were not. The training program was intended to help improve the quality of the documentation that is being submitted. In showing our agents and SSC the value of submitting improved documentation, it has enabled us to cut down on the number of questions, improve the time it takes to onboard a group, and ensures that we can meet our customer expectations of timeliness.

The results of our new training program were immediate in that the number of missing information items that came in from the agents, as well as from the SSC team, were down which meant that the onboarding timeline was impacted in a positive way. I used random data from past group submissions so that I could get a baseline of where we were at prior to the training. I did this for the SSC's and for the Agents, as well as a control group of agents that were not involved in the training so that I could analyze the differences. Here are the results for each stakeholder and the control group:

- i. **SSC's:** Went from an average of 1.51 errors per group to 1.27 errors per group, resulting in an 18.73% improvement.
- ii. **Agents:** Went from 3.43 errors per group, to 2.61 errors per group, resulting in a 31.13% improvement.

- iii. **Control group of agents:** Went from 3.66 errors per group to 3.53 errors per group. While this was a 3.69% improvement, I would simply attribute this to the ebb and flow of the normal onboarding process.

Jacques Alexis stated it best in Shayna Joubert's Northeastern University article, "It's equally important to measure performance upon completion of the project. This allows you to compare actual results to their baselines to evaluate overall and individual performance" (Joubert and Alexis, 2021). I have incorporated performance measurements into this new training program that are easy to obtain from year to year, department to department, and person to person. In doing so we can evaluate where our shortfalls are, help to correct them, and continue improving our training program.

### **Section 6: Conclusion**

The goal of this capstone project was to improve our current training program which has not been updated in a few years. Our industry changes from year to year, and sometimes from quarter to quarter. While we have tried to communicate changes as they come out, however we failed when it came to adding these changes to our existing training program. I chose to write a professional action paper that addresses the process I took in examining our current program, creating and implementing a newer version, and the results of the updated training program.

I have learned that there are many facets to project management which can be beneficial to not only myself, but to anyone that is impacted by the project outcomes. Even a small change to a single process could have an impact on a stakeholder that is not a part of the immediate project. I have also learned that surveys, while appropriate in some situations, are not always the best method for drawing out a substantive response from those taking them. When I

physically picked up the phone and conducted a semi-formal interview with my stakeholders, I was able to glean a tremendous amount of useful information for my project.

The stakeholders that have benefited from this updated training include myself, the Sales & Service Coordinator team, the internal processing teams, our agent community, as well as our clients. The stakeholders understand what items on the application can hold up a group, what items are not going to cause delays if they are missed, and overall what the process behind the scenes entails. The capstone project helped me to hone my project management skills as they pertain to analyzing, organizing, and implementing information in a more controlled and productive manner. Having to analyze our current training platform opened my eyes to how outdated our material has been. Structuring questions and gathering feedback in order to create a new training program was something that I was not accustomed to. Finally, analyzing the results showed me that we still have areas of opportunity where we can create an even better training program for future stakeholder development.

## References

HBR Editors. (2016). *The Four Phases of Project Management*. Harvard Business Review.

<https://hbr.org/2016/11/the-four-phases-of-project-management>

Joubert, S. (2021, January 11). *How to Develop a Project Management Plan: 12 Steps to Success*. Northeastern University Graduate Programs.

<https://www.northeastern.edu/graduate/blog/developing-project-management-plan/>

Nathan, Arte. (2016, 10). *7 Key Steps for Better Training and Development Programs*. Society for Human Resource Management. <https://www.shrm.org/resourcesandtools/hr-topics/organizational-and-employee-development/pages/key-steps-for-better-training-development-programs.aspx>