

Chapter 5

Training Personnel

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The idea of a quality management system is to seek the continuous improvement of all procedures and processes. Most of its tools demand the participation of all staff, and most problem-solving groups and improvement groups have the participation of people from different departments. Because of that, enabling staff to work as a team and to have this broader view of all processes is one of the first training programs that should be offered. Once the staff has a complete view of “how things work” beyond their department, then they will be able to work with the quality management system.

Getting to Know Each Other

In all companies and clinics, people usually have the opportunity to interact and get to know each other in informal settings, such as during lunchtime and reunions. However, in the working place, due to the actual physical separation of departments and evidently different activities and responsibilities, people interact very little and tend to share only the essentials. Therefore, nobody knows exactly the activities performed by the other, unless they work together in the same department. The knowledge they have is very superficial and therefore insufficient to understand all nuances of their activities.

One of the best trainings to start with is the “presentation of departments.” It is very simple. Each department prepares a presentation showing what they do, their responsibilities, difficulties, how their work impact their colleagues, patient satisfaction, etc. All important information should be presented, without mentioning the technical aspects of the procedures. The idea is not to train colleagues and enable them to do the job, but to show each other the activities performed and have a better understanding of the processes involved in the services the clinic provides.

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This training should not be done in a hurry. Let staff take their time to absorb all information presented and see how things work in everyday practice. Besides giving people a clearer view of the place they work at, this training tends to put an end to everyday comments and complaints, such as “why is it taking so long?” or “why did this happen?” or “why is the patient complaining?” or “why didn’t he or she do it?” Understanding what the other does gives people the strength to unite themselves as a group and also to support each other when needed.

Interdepartmental Observations

Another very basic idea that can help is to let the staff observe each other at work. All training programs demand a certain amount of time, but this one is particularly more complicated as it has to be done during working hours and preferably during “busy” working hours to be effective. The idea is very simple: each team member spends a few hours observing a colleague from another department at work. This observation enables them to understand what the other does in a very realistic way and works even better if done after the first suggested training.

These interdepartmental observations are very effective because they are not limited to pure “conceptual” descriptions of one’s work. Instead, they let people see the effort that has to be done and the energy that has to be spent to perform certain activities, besides letting people see the pressures involved and how their colleagues have to deal with them. Many procedures may look rather easy, specially looking from the outside. Therefore, it is quite explainable and honestly very normal for people to underestimate someone else’s work and overestimate their own.

SWOT Analysis

A SWOT analysis is a good technique to be used after the previous training described. The staff already knows how all the department work, so now it is time to evaluate the whole system identifying what we do best and what can be improved; what we could do but are not doing at the moment; and what we have to fear and prepare ourselves to. It is a good way of analyzing the scenario and planning the future of the organization. It is also a simple technique that can help the staff have the broader view so necessary for the quality management system.

The creation of the SWOT analysis is credited to Albert Humphrey, a management consultant who devised it during his work at Stanford Research Institute in the 1960s and 1970s. The objective of the SWOT analysis is to identify the internal and external factors that have an impact on the organization’s objectives. It may be used in decision-making situations, but also as a means to improve a procedure, a process, or the business as a whole. It depends on the subject of the analysis.

SWOT stands for Strengths, Weaknesses, Opportunities, and Threats. The “strengths” are the internal characteristics that make a business and/or team unique and successful. It includes everything that is good and positive, for example, the

SWOT Analysis Summary		
Internal Factors	<ul style="list-style-type: none"> • Appropriate infrastructure • Investment in equipment • Consistent results • Multidisciplinary team • Organization • Personalized care 	<ul style="list-style-type: none"> • Bureaucracy • Constant delays • Internal competition • Lack of internal communication • Bad telephone system
External Factors	<ul style="list-style-type: none"> • Demand for oocyte cryopreservation • Improve site on the internet offering patient-friendly tools • Marketing opportunities 	<ul style="list-style-type: none"> • Costs of medication • Emphasis on a single type of treatment • Seasonality • A new clinic was open • Legal law suits

Fig. 5.1 SWOT analysis summary

appropriate infrastructure, or having a motivated team, or offering some type of service that is essential to patients, or the clinic’s reputation. The “weaknesses,” on the other hand, are the “bad” characteristics that represent a disadvantage a business and/or team has, such as a bad telephone system, or an internal communication system that does not work, or even the existence of too many forms and bureaucracy. These are all internal factors that influence performance directly. The strengths should always be used to our advantage and the weaknesses should be identified and seen as improvement opportunities.

Then, there are the other two aspects, which are external. The “opportunities” are the external chances of growth, more profits, or success. They include the demand for a certain type of service that can be developed, or the development of a new technique that can be absorbed and offered, for example. On the other hand, the “threats” are the external elements that may cause trouble or may harm performance, for example, the opening of another clinic that can represent a real competition or the increase in all materials prices that will impact the price of the service offered and so on.

A good way of offering this training is to divide it in two different days. On day 1, present the technique and explain the terms giving practical examples. Hand in templates to be filled in and give a few days, a week, for example, for the staff to think about it and come up with ideas. After everybody turns in their “homework,” summarize the information and present it on day 2, when you can then work on suggestions and strategies to address the points that were raised. On day 2, you may end up with the summary shown in Fig. 5.1.

The results of this analysis may be surprisingly pleasant. People in different departments have different points of view, as our clients' points of view are most of the times different from ours. A lot can be learned from this exercise. Besides, it certainly makes the staff reflect about their own performance and how it affects the general performance. This is a good way to trigger self-evaluation and general improvement. From this analysis, new services can be developed and offered, procedures can be reviewed and improved, etc.

Ethical and Moral Values

Conceptually, companies are basically a group of people working together. As people behave according to their own individual "values," so do companies. Therefore, it is very important to define some "common" principles to modulate people's behavior inside the working place. A mission usually states the ethical values of a company but does not describe the everyday behaviors which show our moral values. So what a mission states can be interpreted and actually put into practice in very different ways according to each individual principles and values. For a mission to be fulfilled accordingly and uniformly, there must be some common shared values to guide your team.

During this training, the staff can define these values, discuss how to apply them, and analyze the implications of these values. Even though this training, which is more of a general discussion, may seem very unimportant, we must bear in mind that many countries around the world have very poor educational systems. Besides, having attended a good school or university does not guarantee good moral values, as it depends on individual family and life experiences. Moreover, the idea here is to build "common values," and it is impossible to assume people have the same principles simply based on their curriculums.

Values can be divided in values related to the internal public which is basically the staff and to the external public which is basically our patients. Read below a few examples of shared values which can be applied to both publics:

- Honesty and transparency
- Clear and immediate communication
- Respect people
- Respect patients' rights to parenthood
- Confidentiality
- Respect legislation

Just as an example, let us analyze the value "respect people" (Fig. 5.2). It is important to say that the values defined will only be followed if the "leaders" of the clinic set the example. A strong leadership is what guarantees real training results. The leaders must be directly involved and must be the first ones to follow what was established. As quality pioneer J.M. Juran said, "To my knowledge, no company has attained world-class quality without upper management leadership" [1]. A manager,

Example of Moral Value

RESPECT PEOPLE

WHO	HOW
Secretary / Receptionist	<ul style="list-style-type: none"> • Being cordial • Understanding patients' needs • Not letting patients wait • Being helpful • Informing patients of delays or any other problems • Trying to schedule appointments at the best time for patients
Nurse	<ul style="list-style-type: none"> • Being cordial • Treating patients according to their individual needs • Being helpful • Explaining procedures so as to calm patients • Understanding patients' worries and nervousness • Following correct technical procedures at all times
Laboratory Technician	<ul style="list-style-type: none"> • Being cordial • Doing everything possible to help patients accomplish their parenthood dream, for example, exhaustively search semen samples, working extra hours when necessary to finish procedures, etc • Giving clear explanations • Being honest and transparent • Following the described laboratory procedures • Communicating problems and deviations immediately
Physician	<ul style="list-style-type: none"> • Being cordial • Making an exhausting investigation • Explaining diagnosis and treatment clearly • Giving patients a choice based on well-explained treatment options and outcomes • Following correct technical procedures at all times • Admitting limitations

Fig. 5.2 Example of moral value

who does not respect his staff, does not listen to them, and does not help them, can never expect his staff to be helpful and respectful toward their colleagues or patients. They may be so, but it is impossible to demand something we do not do ourselves, at any level.

Besides, the way things are repeatedly done will determine the everyday behavior. If we always let our patients wait for hours in the reception area, this becomes a habit and will happen all the time as if this were something “normal.” It does not

have to be normal unless we assume it is. Some recurrent problems are directly related to these repetitive behaviors, and some changes in principles and values may need to be analyzed to correct nonconformities. A simple review of a procedure may not guarantee the end of the problem.

In other words, we become what we do repetitively. An English proverb says that “practice makes perfect.” However, its interpretation must be done with caution. A “good practice” may produce “perfect results,” while a “bad practice” may well lead to “imperfection.” Aristotle, the famous Greek philosopher, used to say that, “the moral virtues are produced in us neither by nature nor against nature. Nature, indeed, prepares in us the ground for their reception, but their complete formation is the product of habit.”

Quality Management Training

This part of the training program will depend a lot on the quality management system that is being established. It is important to cover all aspects of the system and also train your staff about the specific guidelines that are going to be followed, if the case. For example, if an ISO 9001 will be used and, especially if a certification is part of the goal, give a specific training about it, so people can understand the process.

When procedures and processes are being described for the first time, involve your staff in the development of these documents and make sure they are trained. The staff must also be trained on how to use all tools created, such as the registration of nonconformity and how to find the root cause and suggest corrective actions. Specific training should be given to ensure the tools will be used, the procedures will be followed, etc. Figure 5.3 shows a few examples of quality management system training programs.

Evaluating Performance

Every training program given should be registered. One cannot evaluate results without properly controlling the information taught. Besides an attendance list, each team member should have a training file, where all internal and external training programs attended are registered (Figs. 5.4 and 5.5).

From these individual training forms, the staff can be evaluated. Was the training program effective? Was the new technique taught incorporated in daily work? Did the training improve performance? Is the tool presented being appropriately used? And so on. When an external training is offered, especially when it involves a degree or a specific course such as a language course, use the report cards of the institution as an evaluation document.

QMS Training Programs	
TRAINING	DEPARTMENT
Mission Statement	All
Quality Policy Quality Indicators and Objectives	All
How to register a nonconformity and corrective actions	All
How to register preventive actions	All
How to describe procedures and processes	All
Procedures/Processes	Individualize by department
How to review procedures and processes	All
Internal Auditors	Only selected staff
Auditing Process	All
Internal Communication	All

Fig. 5.3 QMS training programs

Another way of evaluating the efficacy of a training program is by observing indicators already used. For example, if the secretaries attended a training program to better assist patients, check if the results of the satisfaction questionnaire on this specific item have improved, the efficacy of a laboratory training program can be checked on the laboratory indicators or results, and so on. When a training program does not produce the expected results or, in other words, is ineffective, a new training can be offered or, depending on the case, a closer analysis of the individual performance should be made to verify if the problem was with the training itself or with the person involved.

Giving Feedback

Feedback is the basis of all human relationships. It determines how people think, how they feel, how they interact, and in most cases how they face their daily responsibilities. We are generally very fast to point mistakes but usually very slow to recognize right actions and accomplishments [2]. In fact, we usually give only

TRAINING ATTENDANCE LIST		
Date:		
Time:		
Training Description:		
Objective:		
Given by:		
Participants	Department / Position	Signature
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		

Fig. 5.4 Training attendance list

corrective and negative feedbacks, and even sometimes offensive, and tend to never give positive feedback.

The type of feedback we give determines the response we get. When a team is not working as we wanted or if we detect inappropriate behaviors, that may mean we are not giving enough feedback or the feedback we are giving is not appropriate. Giving feedback is an art and is one of the most important aspects of guiding a team toward common objectives. People need to know how they are doing regardless of their position in the hierarchy.

There are a few important aspects of giving feedback that should be observed:

1. Give feedback regularly establishing a periodicity.
2. Choose the appropriate time to give feedback. Feedback should be preferably given immediately; however, when dealing with corrective feedback, analyze the situation. Never give feedback if the working place or people involved are too tense, and never criticize someone in public.

Besides, each team has different needs, and it is simply impossible for anyone to say the exact training programs that should be given to your team. Take some time reflecting about it, talk to your staff, talk to people who have already been through the process, read books and articles about it, and then decide what to do. There is no such thing as a “perfect” recipe to follow.

In short, dealing with a quality management system is ultimately dealing with people, and they are inevitably, as all human beings, different and full of imperfections. When forming a team, people interact differently too, and that is what makes teams so different and each working place so unique.

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