

Retention Planning Worksheet

Create your retention team: Keep in mind the skill sets needed in each role as you select the participants.

Coordinator	Keeps all activities on time and tracks progress; updates plan as needed from feedback.
Onboarding Representative	Oversees credentialing, relocation, marketing, spouse/SO employment.
Orientation Representative	Oversees office set up, EMR training, facility tours and introductions, initial patient scheduling.
Communication Representative	Oversees mentorship, recognition, practice reviews, satisfaction surveys, family community acclimation.
Spouse/SO/Family Liaison	Additional support to families and may be a non-employee.
Other Support Team Members	Important to success of overall retention plan.

Notes

Identify resources needed and available.

Materials	Policy & procedures manuals, Medical staff bylaws, EMR training manual, etc.
Contacts	Lists of medical staff contacts and community members who may assist in retention work.
Budget	Determine how much money will be needed for retention elements.

Notes

Retention elements and tasks with timelines.

Onboarding Plan	This includes tasks related to credentialing, marketing, relocation and family welcoming activities.
Orientation	Tasks around mandatory and individual orientation of provider.
Recognition Activities	Formal, informal and day to day recognition activities.
Social Activities	Regularly scheduled events to assist in assimilation to the community for the provider and family.
Mentorship	Are you large enough to need one? Formal or informal?
Practice Review	Who will perform these? At what interval? What tool(s) will be used to evaluate?
Satisfaction Surveys	Who will perform, at what interval and using what tool(s)? What will be done with the information?
Exit Surveys	What questions could you ask of departing providers to help you improve retention? Who does this survey?

Notes

Evaluate your retention plan.

Survey New Providers About Steps in the Process	What tool? Who does survey? At what time?
---	---

Notes

Tips from others at this workshop.