



*After much time and effort, you've added a new employee. Awesome! Now what? 10 simple steps to creating an in-house training program.*

Getting a new employee through the front door is just the first step in your journey of creating a quality employee. The next step, training, is thought to be the most important in the employment process. Effective training maximizes the value a new employee adds to your business and establishes the necessary foundation for a long-term, positive employment relationship.

Job satisfaction is one of the key factors that leads to an employee's choice to remain with an employer, and creating a basic training program can reap significant benefits in terms of employee retention and job satisfaction. Unfor-

tunately, many funeral home owners are overwhelmed by the thought of training a new employee, let alone developing a formal training process.

But creating a training program is not as difficult as you might think. Here are 10 simple steps to follow for creating your in-house training program.

**STEP 1:**  
*Identify  
key tasks*

Review the employee's job description and identify the key tasks on which the training should be focused. This will ensure that the em-

ployee will adequately meet your expectations. If you do not have a job description, compile a list of the tasks that are required of the position. Here are some tips:

1. If the position requires the employee to interact with the public, include training on customer service-related tasks such as answering telephone calls, scheduling arrangement appointments and greeting families.
2. Will the new employee handle paperwork-related responsibilities? If so, train him or her on how to correctly complete the paperwork and

be sure he or she understands how the paperwork progresses through the funeral process (e.g., cremation authorization, embalming authorization).

3. If there are specific physical actions that the employee must perform, provide training to ensure that he or she is properly conducting the activities (e.g., removals, embalming, visitations or service setups).
4. Are there time-sensitive responsibilities? Communicate all specific timelines or deadlines the position demands and explain how they can be accomplished (e.g., death notices, inventory replacement).

## STEP 2: Who is responsible for training?

Determine who will be responsible for training the new hire. Frequently, this falls to those with the most time or with the same job title, but

this may not be the most effective way to train new staff. It is critical that those providing the training are highly skilled in the tasks to be trained. Carefully consider who should provide training to new hires. All training can be done by a single individual or it can be split between several qualified employees based on their area of expertise. There are advantages to both approaches.

### 1. Single Trainer

#### Advantages:

- A single trainer will likely present a consistent approach to each task he or she illustrates.
- The new hire may find it easier to bond with just one person.
- It is simpler for management to hold one person accountable for training than multiple people.

#### Disadvantages:

- This level of responsibility can be stressful and time consuming for a single individual.
- One individual may not be the in-house expert of all tasks that must be trained.

### 2. Multiple Trainers

#### Advantages:

- Sharing the responsibility for training can reduce staff stress and help work flow move smoothly.

- Each trainer can focus on those tasks in which he or she has the expertise.
- Supports a philosophy highlighting team effort.

#### Disadvantages:

- Coordinating multiple trainers and a training schedule can be a challenging undertaking.
- There may be inconsistency in how these individuals approach training.

## STEP 3: Give trainers needed tools

Once you know who will provide the training, make sure that they have all of the skills and tools they'll need to successfully train a new hire. Be sure they have any procedure manuals relative to the position being trained and include any memorandums that clarify or update procedures. All paperwork associated with the task to be trained should be made available. The trainers need to clearly understand their objective and your expectations so that they can be diligent in their training. Here are some examples of specific types of training:

#### Telephone Etiquette

- Answer the phone with both the location name and your name. For example, "ABC Funeral Home, [insert your name here] speaking." If you must place the caller on hold, ask his or her permission to do so: "May I place you on hold while I look that up?"
- Use grammatically correct language. As an example, there is no such time interval known as "a sec," as in "Let me put you on hold a sec" or "Just a sec." The word is "second." Also, if someone thanks you for your efforts, the proper reply is, "You are welcome," not "You welcome." An alternative response could be, "It is my pleasure."

#### First Call Procedure

- Explain how to identify a telephone call as a first call.
- The new employee must understand what paperwork is necessary to complete the first call process, as well as what information to gather for your business to serve the family.

This process tends to be unique for each business, so there should be a very specific procedure.

## Removal Procedure

- Provide the procedure for how to remove a body from a private residence versus a facility.
- Explain what vehicle to use and specific care of the vehicle.
- Be sure to educate the new hire on how you prefer he or she handles communication with the family.
- Address any and all paperwork associated with this process.

## STEP 4: Segment the training

Divide the training into logical steps that build from one task to another. Consider the approach of structuring the training to mirror the process your business follows once a family contacts the funeral home. Not every business has the same process, so to avoid simple mistakes, the employee needs to be trained on *your* process.

For example, you do not want a new employee to handle a first call if he or she does not know what information to collect. Likewise, don't instruct an employee on how to transfer a body from the bed to the cot until he or she knows how to raise the cot properly.

Never assume that someone knows what to do. Confirm it, and if not, educate him or her on how to perform the duty.

## STEP 5: Learn by doing

Many people learn best by actually performing a task. With that in mind, plan for the new employee to complete a specified assignment on his or her own after being given instruction. This can be as simple as prepping the van for a removal or putting together the arrangement folders for families. Do you use a specific software program to track your sales? Let the employee complete the data entry of sales contracts. This type of hands-on experience will reinforce your training.

After the employee completes the project, take time to go over his or her performance. Offer compliments and useful

critiques. Remember, providing positive feedback will help build the employee's confidence and he or she will find it easier to move on to the next function.

## STEP 6: Implement training program

Finally, the training program is ready to go. Wait, hold on! Before implementing the program, run through it yourself or have an existing employee do a trial run. Put yourself in the new employee's shoes. Does the training make sense? Does it provide the employee with all of the tools he or she needs to be successful with the company? Look at the instruction materials and procedures. Are there any holes to fill in?

Doing a run-through will help you determine if the flow of training is appropriate. Once you have gone through this review process, you'll likely have the training structure completed. However, there is more to educating a new employee than just the training schedule.

## STEP 7: Identify a mentor

Identify a mentor who will be assigned to the new employee; this may or may not be the person chosen to actually train him or her.

This advisor will be the new employee's ultimate resource. As a mentor, he or she will be expected to be in daily communication with the new hire for at least the first 90 days, or longer, if necessary. The mentor will ensure that the new hire feels welcome in the established work setting and will follow up on any training questions he or she might have.

A mentor facilitates the bonding of the new employee into the work environment and helps him or her successfully navigate those first few weeks, which can be challenging not only for the new hire but for existing employees as well. Most employees do not like change, and it is not uncommon for new hires to feel like outsiders and perhaps even unwelcome. A mentor can help minimize this type of atmosphere and set the foundation for a long and beneficial employment relationship.

## STEP 8: Promote a positive atmosphere, focus on team building

Evaluate the current office climate. Is it pleasant and energetic or solemn and stressed? Formulate a plan to make it pleasant and energetic.

Consider a group lunch either on or off the property, which can help create social conditions that will break down barriers frequently faced by new employees. During staff meetings, encourage active participation by all employees, including the newest arrival.

The daily business atmosphere has a significant impact on employee longevity. A work setting that encourages not only personal growth but a team-oriented approach to serving families will provide a solid foundation for employees' job satisfaction and is also a catalyst for enhanced customer service.

## STEP 9: Start the training program slowly

No one can learn everything they need to know about a new work situation in a single week or even several weeks. Set reasonable expectations

and pace the training to maximize the new hire's attention span and accommodate the trainer's work responsibilities. Balance one-on-one training with individual assignments to reinforce that training. Also expect that there will be times when the trainer won't be available to train based on the needs of the families being served. During those times, the new hire can focus on reading manuals, data entry tasks or refreshing himself or herself on what has been taught so far.

## STEP 10: Give regular feedback

Be sure to provide regular feedback to the new employee. What is he or she doing correctly and what needs further attention? Ask questions that require the new hire to provide more than single-word responses.

For example, don't ask, "How are things going?" and not expect "Good" for an answer. Ask questions such as, "Tell me the focus of your training today" or "Can you explain to me how to answer a

first call?" Listen carefully to the employee's responses, as they can reveal many things, including, for example: 1) Is the training moving at a reasonable pace? 2) Is the employee at the point at which you expected at this time? 3) Does it appear that the employee is understanding the training? Based on the information you learn, adjust the training (schedule, method, trainer) accordingly.

Finding a new employee can be an expensive, time-consuming and frustrating process. It can take weeks to find a qualified employee given a hiring process that typically consists of placing ads, interviewing candidates multiple times, checking references and finally selecting the best prospect. A training program is an invaluable tool in transforming a new hire into a highly skilled and well-established employee representing your firm in the community.

Be sure to manage your expectations to allow your new employee ample time to become familiar with you, the business and his or her specific job responsibilities. Be willing to dedicate weeks to training so that a new employee will not only be a beneficial asset to your business but a happy and content staffer who will remain for an extended period of time.

And always remember that retaining a qualified employee is much easier and cheaper than going through the process of finding a new one. \*

*Stephanie Ramsey, human resources specialist for The Foresight Companies LLC, has managed both small staffs and those with more than 200 employees and 25 supervisors reporting directly to her, as well as run an 800-call regional combination business. Ramsey has a unique perspective on the challenges funeral and cemetery business owners and managers face when dealing with employee issues, combining hands-on employee management experience with knowledge of various industries to develop workable human resources structures within any size business. She has written many employee handbooks and other job-specific documents for clients nationwide. In addition to speaking at national conferences, Ramsey writes a quarterly newsletter on HR matters that can be viewed at [www.f4sight.com](http://www.f4sight.com). She can be reached at [stephanie@f4sight.com](mailto:stephanie@f4sight.com).*