





# Planning Critical for Successful Cross-Training

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KEY SURGICAL

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## LEARNING OBJECTIVES

1. List the types of employee cross-training opportunities
2. Identify the benefits and potential drawbacks of cross-training
3. Describe the components of an effective cross-training program

“Where’s Betty?” Lisa, the second-shift supervisor, asks nervously. “She called in sick today. Don’t worry! Someone is staying over to fill in,” yells the first-shift supervisor, Tom, as he rushes out the door. This is bad news. Today was a busy total hip day, and no one knows the cleaning process on the total hip sets as well as Betty. Lisa rapidly checks the remaining staff members, but no one is trained to properly clean the procedural sets. Now, she is dreading her night.

While this scenario may seem all too familiar, a well-defined cross-training program within the department or between departments could have prevented this turn of events. Cross-training makes covering absences easier, but it is so much more than that.

## Objective 1: List the types of employee cross-training opportunities

Intradepartmental cross-training focuses on supplying a versatile workforce within a single department. Departmental training policies and procedures define cross-training expectations. Staff members may still have specific job duties or specialize in

a particular aspect of the department; however, employees who are able to perform any position within the department give supervisors scheduling flexibility and coverage for vacations and call-offs.

Cross-training is not limited to a single department. Interdepartmental cross-training occurs when staff members from different departments who perform similar tasks receive training for each department’s activities. Consider Sterile Processing (SP) staff trained within the Endoscopy Reprocessing department. Although each may have unique policies and procedures, different reprocessing instructions and equipment, the theory and practices associated with effective cleaning, high-level disinfection (HLD) and sterilization are the same. While cross-departmental cross-training can provide scheduling flexibility for both areas, its greater advantage is staff satisfaction. This change of pace can help lessen the burden of routine daily tasks and ward off potential staff boredom.

Advanced cross-training occurs when staff members receive training from a functional group with significantly



different roles, responsibilities or tasks. Many of the functional groups within healthcare facilities require specialized education—doctors and nurses, for example—and because of this, it can be difficult to create these types of cross-training opportunities. Still, some functional groups do not typically require specialized education or technical training, such as shipping, purchasing and customer service. An example of an advanced opportunity for an SP staff member is cross-training within the Shipping and Receiving department. Even though the SP staff member is familiar with the reprocessing of soiled instruments, the employee would not have expertise related to shipping and receiving. This type of cross-training may include policies and procedures for shipping and receiving items, transportation of biohazardous materials on public roads, and receipt processes for authorization of payments.

### **Objective 2: Identify the benefits and potential drawbacks of cross-training**

Human Resources (HR) professionals know that cross-training is a benefit for every business and department. Cross-training raises skill levels, reduces job monotony and gives employees advancement possibilities. Supplying cross-training opportunities to staff members can strengthen ties to the department, keeping staff engaged and less likely to leave.

Cross-training can also promote teamwork between departments. Individuals learn more about the responsibilities of other departments and how their work affects others. Interdepartmental cross-training helps build empathy, which stimulates valuable conversations instead

of engaging in time-consuming disagreements between departments and colleagues.

Supervisors benefit from teams that are cross-trained on all departmental functions. Cross-trained employees can adeptly cover absences from vacations, illnesses and other causes of staff shortages. Adjusting departmental workload “on the fly” also becomes easier. When one area has an excessive workload, supervisors can easily send individuals working in a different location to help. Cross-training is also critical when preparing for future departmental leaders. Often called succession planning, cross-training key staff members in management activities allows future leaders to learn the responsibilities of management without the added stress of running the entire department. Creating a pool of capable individuals allows quick filling of open supervisor and manager positions. It also gives employees a pathway for career advancement.

Cross-training is a way to empower staff and prevent boredom, but some employees may see cross-training as a threat to their job security. As a result, threatened staff may sabotage cross-training to protect their job. It is important to reassure all staff members that cross-training will neither eliminate positions nor require them to work in the new position forever. It is critical to stress that cross-training increases the versatility of the team and allows for added help when supervisors, employees or areas need it most.

Other staff members may view cross-training as “more work” but without more pay. Learning the tasks of different departments or temporarily stepping in as a supervisor can add stress and work to an already full day. SP leaders can reduce this stress by balancing training

and regular work hours. They should consider using a different staff member to cover the regular shift for the person in training.

Adding staff to a schedule allows time for cross-training but it also increases cost. SP tasks, however, require technical precision and cannot be learned in 10 minutes. It takes time to reach competency. The combination of time and increased staff to cover positions can add up quickly, but shortcuts to the training process can lead to errors and poor-quality work, both of which can negatively impact patient safety. SP leaders must take these and other factors into consideration when developing an effective cross-training program for the department.

### **Objective 3: Describe the components of an effective cross-training program**

There are five critical components of a successful cross-training program: creating a plan, defining the program, rolling out the program, recognizing staff, and maintaining competency.

**Step 1:** Creating a plan requires determining which cross-training is mandatory and which is optional. Mandatory cross-training should be training that is necessary for the department’s success. Typically, this focus is given to tasks and roles needed to cover absences or areas that often need temporary help to clear backlogs or manage increased workloads. Optional cross-training, on the other hand, provides opportunities for staff members to expand their skill sets or strengthen their working relationships with other functional departments.

Care should be taken to avoid cross-training in areas which a degree or certification is needed prior to performing any tasks. For example,



taking part in a surgical procedure as an Operating Room (OR) nurse or surgical technologist may not be possible for an SP technician. Although cross-training will not work in such instances, supervisors and managers can still foster an understanding of responsibilities through a shadowing program.

Shadowing typically occurs during the employee onboarding process and involves new staff members following the daily activities of others. By watching the tasks performed, employees gain an understanding of the function and how it fits with their own jobs. Shadowing builds empathy and teamwork between departments when cross-training is not practical. SP staff benefits from shadowing OR staff and vice versa.

Initiating a cross-training program takes time and costs money. It is important to understand the impact that added training has on manpower, especially overtime. Budgets should be reviewed, adjusted and approved before training begins.

**Step 2:** Next, leaders need to define the cross-training program within their departmental policies and procedures. The program should include both mandatory and optional cross-training opportunities.

Policies and procedures for mandatory cross-training should include a complete list of tasks and responsibilities that identify the expected length of training and relative order; the person(s) authorized to lead the training; how the staff members will be assessed for competency; and how competencies will be documented and maintained. Learning does not happen overnight, and leaders must remember that people do not learn in the same way or at the same pace. It is necessary to be flexible to allow employees the

opportunity to complete their cross-training.

Leaders should also consider whether to include mandatory cross-training as part of staff performance reviews. Performance reviews are an excellent time to track obtainment of new skills and feedback on the cross-training activities.

Optional cross-training may not be a required part of an employee's job, but these opportunities still necessitate policies and procedures that outline the process. Consider the following when preparing policies and procedures for optional training:

- Who will authorize and provide the training?
- How will the training be documented?
- How will competency be confirmed?
- What will be the time commitment for the staff member(s)?
- When and where will training occur?
- How will staff members in all involved departments be affected or compensated?

Succession planning may require added elements. Succession planning identifies staff, supervisors or managers who are working toward their next career step(s) within the facility. Employees may become supervisors, supervisors may become managers, and managers may become directors. Cross-training for these roles should be targeted to those individuals deemed most likely to succeed at the next level. At the same time, all staff members should be encouraged to express interest in these opportunities.

**Step 3:** The rollout initiates both mandatory and optional cross-training opportunities. If cross-training is new for a department, it is important for the leader to involve HR and reassure staff members that the purpose of cross-training is to help the department

perform better. Again, it is essential to reassure all staff members that cross-training will not affect their job security. Leaders should stress the benefits of having a highly skilled group that is capable of responding to any event. Creating a mentorship program may also help alleviate concerns of job security or complacency. Mentoring recognizes the value and experience of existing staff and provides a resource for new staff members undergoing cross-training.

**Step 4:** Recognition shows staff members that they have done a good job and are valuable members of the team. It builds employee motivation. Recognition should be based on the cross-training achievement goals. Milestones should be identified within policies and procedures; one such milestone could be the completion of all cross-training activities within decontamination. Recognition does not have to be monetary. It could be a thank-you card, announcement during the department meeting, or complimentary lunch. It is most important that the recognition names the specific goal that was achieved and is delivered promptly upon the completion of the training or reaching a milestone within it.

Although public recognition strengthens the program among the team, it may not be wanted by individual staff members. The recognition program should be flexible, allowing each staff member to choose whether they want to be recognized publicly. A combination of public and staff-selected recognition allows team members to congratulate and celebrate one another, whereas more personal recognition by the manager can support those who shy away from public recognition. Flexible recognition appeals to different personality





types, which gives more worth to the recognition. It may include:

- Public announcements of achievements on bulletin boards or in newsletters
- Handwritten thank-you cards given by the manager
- An achievement certificate that may be posted by the staff member
- Lunch for the staff member and their mentor
- Lunch for the department in honor of their collective achievements

**Step 5:** The final step in the cross-training process is to maintain competency. Cross-training prepares staff members to perform different tasks as necessary. It can also prepare employees for advancement. Still, it is important to remember that any new skill that is not used regularly will likely be forgotten. Leaders should include refresher training to keep competency levels high. The frequency and type of training will depend on many factors. Each leader must evaluate their department's circumstances and develop an appropriate program. Items to consider include:

- How often the new skill will be used
- The complexity of the learning objective(s)
- Whether the new skill is still relevant to staff development and growth goals
- What is needed to demonstrate competency

## Conclusion

Cross-training programs are vital to staff members' abilities to perform tasks. The programs give supervisors the flexibility to position technicians in various roles depending on the needs of a given day. This practice is not just critical to each department's efficiencies. It creates opportunities and sparks interest in career growth within the department

and the industry. Leaders must regularly evaluate and reassess their cross-training programs. The SP profession is evolving at an incredibly rapid rate. Departments that implement and update their cross-training programs will keep employees current on the challenges and changes impacting their department and discipline.

## RESOURCES

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