



Observation Checklist

OBSERVE AND MEASURE COMPETENCIES AND PERFORMANCE IN REAL TIME, ON THE JOB

Measuring and assessing your employees' performance is a critical part of talent management. It provides managers and HR executives with the data they need to make better decisions about development, internal mobility, compensation and so much more.

In some situations or industries, however, fulfillment of required competencies cannot be measured on a typical rating scale or as part of an annual review. Use Cornerstone's Observation Checklist feature to systematically assess and monitor employee skills and performance in the field, while employees are doing their jobs.

KEY FEATURES & BENEFITS

- Give your verifiers, validators or preceptors easy access to observation checklists and replace inefficient, paper-based processes
- Ensure that regulatory reporting is accurate and timely
- Use pre-integrated competency models specific to certain industries
- Specifically define observation ratings and methods
- Identify gaps and areas in which additional training and support is needed
- Run reports on-demand for access to completion data, upcoming deadlines, specific competency achievement by roles or units, and much more
- Software-as-a-Service (SAAS) means no software to install or maintain

SAMPLE INDUSTRIES WHO USE OBSERVATION CHECKLIST

- Healthcare (medical procedures, nursing, clinical competencies)
- Oil and Gas (health, safety and environment)
- Manufacturing (safety procedures, line/assembly operations)
- Financial Services (service delivery)
- Customer Service / Call Center (customer service competency)
- K-12 (classroom teaching skills)
- Retail (quality of customer interaction)
- Any industry (new hire onboarding process)

In many industries – like healthcare, manufacturing, financial services, gas and oil, or retail – employee performance is best measured on the job and in relation to a very specific set of skills or competencies. The typical rating scale and annual performance review does not make sense for every job.

Cornerstone's Observation Checklist lets you assign validators or verifiers to assess competence or successful completion of tasks as employees are at work in the field. For example, check off observed clinical skills as nurses are providing care. Or ensure compliance with critical safety procedures as your employees operate on the job in a manufacturing setting.

The possibilities for observing employee competencies and skills in the field are not limited to any one type of job or industry. Use Observation Checklist for specific jobs, business units or even in your onboarding process – situations where it's critical to record performance in the field, as it happens. Of course, for compliance purposes, Observation Checklist creates a durable record for reporting or audit purposes.

“ We plan to integrate Cornerstone's Observation Checklist module into our training and development process so that our administrators and managers can easily track and monitor care delivery across the hospitals and clinics in our network. It also will help us to further standardize clinical competencies so that nurses are able to migrate between our various facilities when needed. ”

- Jeanne Bonzon,
Director of Learning & Development
BJC HealthCare

BUILD ANY TYPE OF OBSERVATION CHECKLIST

We don't think that one size fits all. The Cornerstone system lets you build Observation Checklists to precisely match workflows and requirements for competence and compliance in all types of job roles and in all types of industries where field performance is critical.

Observation Checklists are created from your existing or imported competency models and can include any number of associated skills which can be assessed or "checked off" in the field by verifiers or validators.

You can also closely define the observation methods that make sense for your organization, including direct observation, simulation, verbal test, verbal review and demonstration.

Customer Service Responsibilities

Stephan Johnson

Skills: 10/10 (100%)

Item	Skills	Validity	Date	Method
Knowledge of product and services	55	Service Quality	6/30/2019	Written Test
Customer Call Completion	14			
<input checked="" type="checkbox"/> Properly logs client request into database <input checked="" type="checkbox"/> Alerts to a client on the issue by using knowledge base <input checked="" type="checkbox"/> Communicates issue to access additional resources if need arises <input type="checkbox"/> Properly reviews case and resolution with the client creates case number to client				
Organizing	10			
<input type="checkbox"/> can articulate main address article <input type="checkbox"/> articulates problem <input type="checkbox"/> identifies resources to call a list of things done <input type="checkbox"/> Amalgam information quickly for others <input type="checkbox"/> Identify public issue areas together				

VERIFY SKILLS IN THE FIELD

In the field, you choose the validators who will have access to Observation Checklist for different groups of employees. These validators observe and record employee performance as it happens on the job and can select the appropriate observation method and apply the date and any needed commentary. Observation Checklists are always available and easy to update.

REPORT AND TRACK FOR ONGOING COMPLIANCE

For business line leaders, HR administrators and compliance staff, Observation Checklist creates a lasting record and audit trail for all field performance observation activities. Report on completion rates for specific skills across the organization or in specific departments. Report on specific competencies and skills or generate a list of comments left by your field verifiers.

Competency Details

Administration of Medicines

Version: 1.0
Progress: 50%

Validated Skills	Validated By	Date	Method	Options
<input checked="" type="checkbox"/> Oral Administration <input checked="" type="checkbox"/> Injections <input checked="" type="checkbox"/> Topical application of drugs	Stephan Johnson Entered By: Stephan Johnson	2/12/2019 Entry Date: 2/12/2019	Observation	
<input type="checkbox"/> Administration of drugs in other forms... <input type="checkbox"/> Nose Drops, Inhalations <input type="checkbox"/> Ophthalmic Drugs				

CHECKLISTS WITH THIS COMPETENCY

Checklist	Description	Status	Due	Progress
Nursing Orientation	Competency assessment and validation is a vital component of training - beginning in orientation and continuing throughout a nursing career. For newly licensed registered nurses, the nurse residency program provides a structured 3 month program that provides a positive first work experience and...	In Progress	4/30/2019	50%
Medical and Surgery	The men and women in this field are registered nurses who work in hospitals, acute care units,	In Progress	8/15/2019	82%

PART OF CORNERSTONE ONDEMAND

Observation Checklist is part of the broad Cornerstone OnDemand Integrated Talent Management suite. You can deploy Observation Checklist alone or in conjunction with platforms for learning and development, enterprise social collaboration, traditional performance and goal management, succession and career management, and more.



Cornerstone OnDemand is a global provider of comprehensive learning and talent management software and services. Our solution is designed to help organizations empower their people and maximize the productivity of their workforce. To learn more, visit www.cornerstoneondemand.com.