

## Pre-Start Date Experience

### 1. This is my Story – to be completed prior to hire and request a picture:

Area I will work in/Job I will perform:

Where did you grow up:

I'm inspired by:

One of the things on my bucket list is:

Where's your favorite place in the world:

If you had one super power, what would it be:

If you could be any animal, which would you be and why:

What's the last book you read:

What's the best meal you've ever had:

What's the coolest thing you're working on right now:

What's your favorite movie:

What are you passionate about:

What's the most ridiculous thing you've ever done:

If you had a day to spend as you choose, describe what you would do:

My favorite snack is:

### 2. Welcome email prior to start date

I'm Vicki Kraai, the people consultant that Kelly told you about. I will be meeting you in the lobby of the bank on Monday (Aug 10th) at 9AM to take you to our training location on 2nd floor. Here is my cell phone number as well in case anything comes up on your travel to Lincoln and anything really - call or text me anytime! 402.xxx.xxxx I have also included a picture so you know who is meeting you (see the end of this email.)

**Where we are located:** Address - Lincoln NE

**Parking:** You may park in the west parking lot any space after the first two rows (first being right next to the building and the second is the first row after the street). The first two rows are reserved for our customers. 😊

**Scheduled hours:** Monday – Friday from 8:00 am to 5:00 pm with an hour lunch and two fifteen minute breaks. During your second week, you may arrange with your manager when to take your lunch and how long you will continue to train in Lincoln vs. Omaha.

**Supervisor:** Mary Doe is your supervisor and you will meet her on Monday.

**Dress code:** Presently, the team in Lincoln is wearing jeans with a blouses, knit tops, but not T-shirts or any screen printed athletic team wear, or screen printed items. Normally (not during COVID-times), for our dress code (attached), we follow the "Business Casual" guidelines. Until an announcement to switch back is made, you may plan on wearing jeans while you are training in Lincoln.

**Covid restrictions:** We are required to wear masks when we leave the training conference room. If you do not have one, one will be provided to you. While we train in the conference room we can socially distance and you do not have to wear your mask however if you feel more comfortable with both of us wearing masks, I'm fine with that as well.

You do not need to bring a lunch on Monday because lunch is on us! We will be ordering from Lazlo's, a local favorite and I will go get it and bring it back to the conference room and we will eat with your supervisor and your mentor as well.

Don't hesitate to reach out to Kelly or I if you have any questions prior to Monday. I'm looking forward to meeting and greeting you on Monday! I see we will get along really well as Napa is one of my favorite places on this earth!

Vicki Kraai

Step 4: Vicki works with Kelly/manager/supervisor to set the schedule for week 1 specific to the area we are training in

Resp	Task	Comments
Kelly	Get to Know you Survey	
Vicki	30-60 day on-boarding survey	
Manager	IT request for workstation/laptop/access	
Kelly	Welcome email or phone call prior to start date	
Manager	Assign roles in on-boarding schedule	
Manager	Paperwork with Express	
Manager/Vicki	Metrics/qualitative feedback outline by position	
Kelly	HR coordination with new hire(s)	
Vicki	On-line training coordination with Cheryl Meyer	Done
Vicki	New hire binder/schedule	Working on it!
Manager/Vicki	Welcome notecard and favorite treat on their desk when they arrive Day 1	

New Hire Orientation & Training Schedule - Mary Doe

Thur - Oct 1		Fri - Oct 2		Mon - Oct 5		Tue - Oct 6		Wed - Oct 7	
8:00 AM	Welcome & Bank Tour (virtual) Vicki Kraal	8:00 AM	Bank Overview - continued & Checklist/Vicki Kraal	8:00 AM	Perform Job tasks/on-line learning and policies review	8:00 AM	Perform Job tasks: ZZ or online training	8:00 AM	Perform job tasks: ZZ, CIP, Filing
9:00 AM	On-line Training/Cheryl	10:00 AM	On the job training/shadowing - (Courtney)			9:00 AM	Mail (Courtney)	9:00 AM	Mail (Courtney)
9:30 AM	Bank Overview /Vicki Kraal	10:15 AM	Mail/ ZZ @ Autumn's Desk (Courtney)	9:00 AM	Mail/ ZZ @ Autumn's Desk (Courtney)	10:00 AM	If finished w/ mail CIP Training (Courtney)	10:00 AM	Perform Job tasks, online training, filing or scanning (On own)
11:00 AM	Meet your manager and 3rd floor Introductions/Sherry		If finished early online learning		If finished early online learning	10:30 AM	Filing (Courtney)	11:00 AM	Perform Job tasks, online training, filing or scanning (On own)
12:00 PM	Lunch with all new hires	12:00 PM	Lunch - on your own	12:00 PM	Lunch - on your own	12:00 PM	Lunch - on your own	12:00 PM	Lunch - on your own
1:00 PM	Bank Overview - continued & Checklist/Vicki Kraal	1:00 PM	Online learning and policies review	1:00 PM	Perform Job tasks/online learning and policies review	1:00 PM	Perform Job tasks, online training, or scanning	1:00 PM	Perform Job tasks: Filing for HST (Kelsey)
1:30 PM	IT Training/Amy SharePoint & Y Drive		When done with Online Learning scanning.	2:00 PM	Security Awareness Training/IT Department	2:00 PM	Hazard Insurance Training (Jessica or Emily)	2:00 PM	Hazard Insurance Training (Jessica or Emily)
3:00 PM	Work Stations/Vicki Kraal		Train on phone system (Liz)						
4:00 PM	On-line learning & policies review	3:00 PM	Levels Review/Check-in with Kelly	3:30 PM	Perform Job tasks/online learning and policies review			4:30 PM	Send Sherry Time Sheet
5:00 PM	Clock out for the day	5:00 PM	Clock out for the day	5:00 PM	Clock out for the day	5:00 PM	Clock out for the day	5:00 PM	Clock out for the day

Trainers: Vicki - include contact information

Supervisor:

Mentor:

Checklist	Need	Completed (Y/N)	Comment/Update
Receive WGB user name & log-in	x		IT to provide to Cheryl M in envelope during her intro
Tour (including lunch/break places, supplies location, etc)	x		
Required Docs to review/complete/sign	x		
Time Sheet	x		
Key Card & access (Susie)	x		
Work station - set-up complete (Sherry/Susie)	x		
Printer access (Amy)	x		
Scanner set up and working (Andrew)	x		
Email Access & email signature (Amy)	x		
Emergency Contact Name & Phone Number (Vicki)	x		
Telephone training (Mary)	x		
Voicemail (Mary)	x		
Jabber training (Amy)	x		
Sharepoint (Compass) training/access/review (Amy)	x		
Y Drive training/access/review (Amy)	x		
Access to on-line training videos and policies (vicki)	x		
Outlook overview/training (Amy)	x		
Microsoft Teams training (Amy)	x		
One Note	x		
One Drive	x		
Encompass	x		
MSP			
LoanSphere			
Optimal Blue			
OnBase			
Asana			
FinIQree			

## **On-Board Experience begins**

Step 1: Vicki greets the new hire in the lobby of the bank and the on-boarding experience begins!

Welcome card or note from the supervisor with their favorite snack provided on Day 1!

Binder Contents:

Overview tab

- On-boarding – week 1 schedule
- Checklist

Expectations tab

- Employee Handbook
- Code of Excellence
- Blank copy of performance review
- Behavior expectations

On-line Learning tab

- On-line training courses access instructions
- Policy and procedure review – where to find this!

IT Resources tab

- Resource for IT support
- Sharepoint/IT resource page and guides for set-up
- IT department IT Welcome Letter
- Windows Login and Password Troubleshooting instructions (with screen shots)

Training material tab

- Bank background/history - powerpoint
- Bank tour
- Organizational Chart – with pictures in powerpoint
- Professional maturity expectations (powerpoint)
- Ideal Team Player expectations (provide employee a book and watch 13 minute Ted talk)
- High level stats – Bank or department at a glance (current landscape)
- FAQ's of new hires

DrakeP3

- Your complete communication profile
- Traits overview
- Best practices – working with others
- Team scatter graph and/or new hire integration report

Bank Terms

- Glossary of internal lingo we use

Notes

## Step 2: New Hire Orientation & Training Schedule

Welcome & Tour – Vicki Kraai	Completed	Notes
<ul style="list-style-type: none"> <li>• Welcome</li> <li>• Bank tour (virtual)</li> <li>• Get to know you discussion</li> <li>• Emergency Contact info</li> <li>• Orientation schedule</li> <li>• Training expectations</li> <li>• Review of Binder documents</li> <li>• Recognition survey</li> <li>• Opportunities to learn &amp; grow</li> </ul>		
<p>On-line required training –</p> <ul style="list-style-type: none"> <li>• Access to training module</li> <li>• Overview</li> </ul>		
<p>Meet your supervisor/manager</p> <ul style="list-style-type: none"> <li>• Team introductions</li> <li>• Overview of your work team</li> <li>• Review of job description</li> <li>• Intro to workspace</li> <li>• Assign a mentor</li> </ul>		
<p>Bank Overview – Vicki Kraai</p> <ul style="list-style-type: none"> <li>• On-line security/confidentiality</li> <li>• Bank History</li> <li>• Code of Excellence</li> <li>• Organizational Chart</li> <li>• Stats at a Glance</li> <li>• Customer experience training</li> <li>• Professional maturity</li> <li>• Ideal Team Player</li> <li>• Review communication profile (DrakeP3)</li> </ul>		
<p>IT Training – Amy</p> <ul style="list-style-type: none"> <li>• IT overview</li> <li>• passwords</li> <li>• Tour of Y drive &amp; H Drive</li> <li>• Sharepoint tour</li> <li>• IT Resources available to you</li> <li>• Access to printing &amp; scanning</li> <li>• Jabber</li> <li>• Backing up your desktop</li> </ul>		
<p>List of “completion” forms, documents</p> <ul style="list-style-type: none"> <li>• Recognition survey</li> <li>• Drake P3</li> <li>• On-line training courses</li> <li>• Policies</li> <li>• Acknowledge from/Emp Handbook</li> </ul>		

### Step 3: 30-45 day Review – How did we do? –

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How did we do?

1. I received sufficient instructions from Kelly and/or Vicki prior to my first day on-site at ABC Bank?

Strongly Agree – Agree – Disagree – Strongly Disagree

Suggested improvements for communication prior to first day:

2. I found the orientation binder, schedule & checklist helpful to navigate the first week

Strongly Agree – Agree – Disagree – Strongly Disagree

Suggested improvements for on-boarding binder, schedule & checklist:

3. The introduction to the team I will be working with and lunch with key people was helpful:

Strongly Agree – Agree – Disagree – Strongly Disagree

Suggested improvements to the team introduction process:

4. Amy did a thorough job of IT resource training:

Strongly Agree – Agree – Disagree – Strongly Disagree

Suggested improvements to the IT training session:

5. My mentor and job shadowing experience was:

Informative & Productive – Overwhelming – A waste of time = I did not shadow prior to training

Suggested improvements for mentoring and job shadowing experience:

6. Please rate your experience of the on-boarding sessions with Vicki:

Excellent – Good – Fair – Poor

Suggested improvements to enhance the sessions with Vicki:

7. Please rate your experience of how your department/team executed the following aspects:

Excellent – Good – Fair – Poor

Making me feel welcomed and included

Workstation set-up (PC, scanner, printer, phones, etc)

Shadowing me until I was comfortable working on my own

On-the-job training

Process and Time frame to complete on-line courses

Providing me feedback on how well I'm doing

Suggested improvements for training & on-boarding of new hires:

8. Employee Name (optional)