



Bank Supervisor School

1

Partner Interviews

- Name
- Bank and Community
- Proudest moment in last 6 weeks



2

2

Meet Your Trainer Karen Butcher

- Trainer, InterAction Training
- Keynote Speaker
- Leadership Coach
- Bank Training Director
- 4-H Youth Agent
- Mary Kay Sales Director
- Secondary Teacher



3

Setting the Stage

- Facilitate through the notebook
- Self-evaluations
- Group activities & discussion
- Practice Conversations
- Video clips
- Toolbox
- Inspiration Nook

Why are you here today?



4



Understanding Yourself and Others

- Explore Your DiSC Style
- Understand Other Styles
- Build More Effective Relationships
- Apply the Information With Your Team
- Create Customer Better Practices

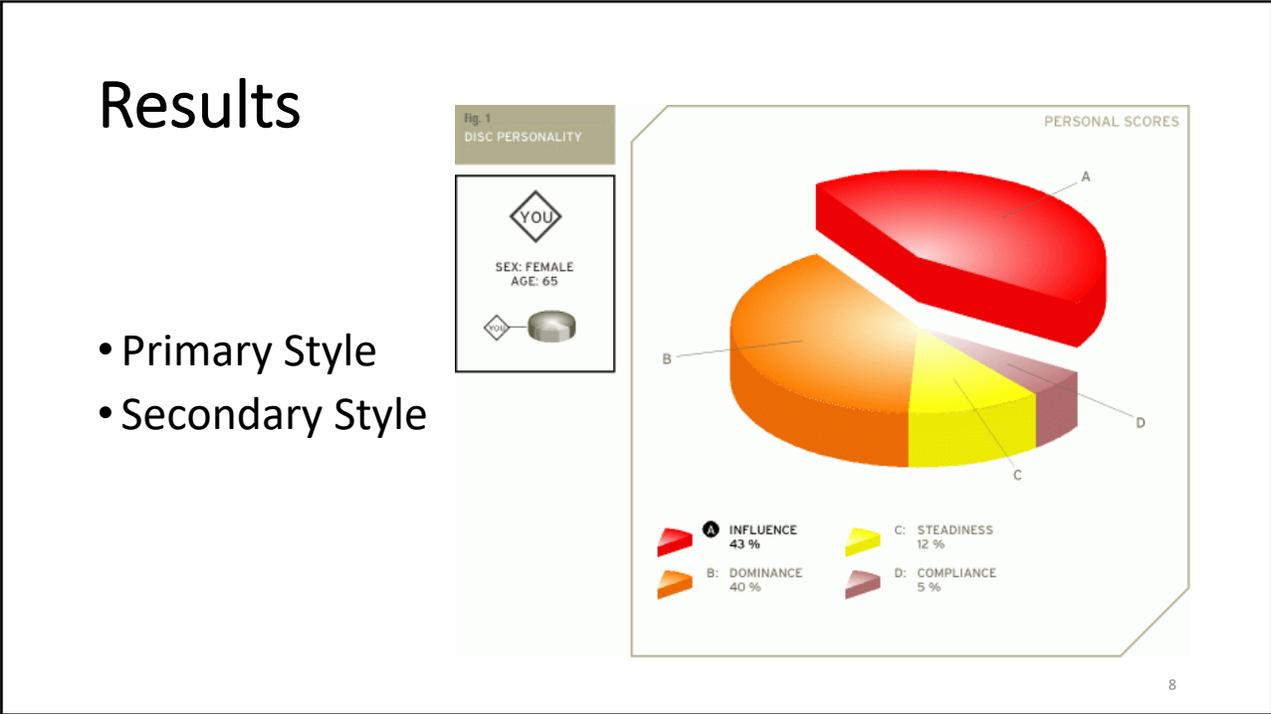
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9

DiSC Model

Dominance	Describes the way you deal with problems, assert yourself and control situations.
Influence	Describes the way you deal with people, the way you communicate and relate to others.
Steadiness	Describes your temperament - patience, persistence, and thoughtfulness
Compliance	Describes how you approach and organize your activity, procedures and responsibilities.

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Tends to monopolize the conversation	Fact finder
Great Listener	Quick decision maker
High energy	Cautious
Competitive	Patient
Likes to work independently	Inspire others to do their best & very optimistic
Operate "By the book"	Like stability
Results driven	Relates/connects well with others, even a new acquaintance
Needs to have challenge in their environment/role	Values long term relationships
Not a fan of chitchat. Get to the point	Likes harmony
Task Oriented	

11

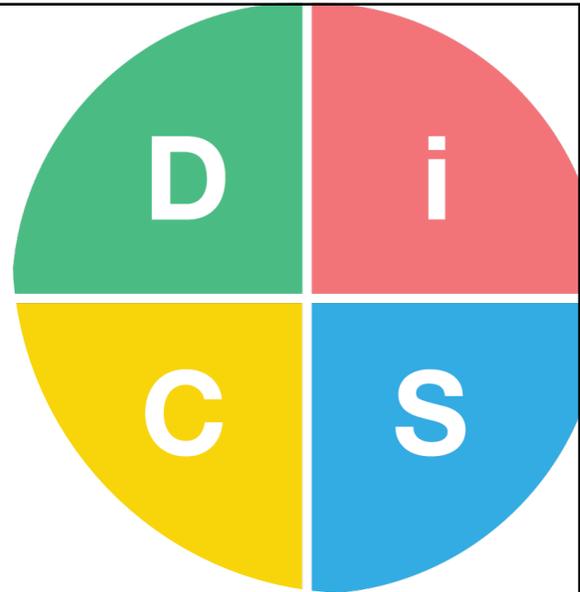
Tends to monopolize the conversation - I	Fact finder - C
Great Listener - C	Quick decision maker - D
High energy - I	Cautious - C
Competitive - D	Patient - S
Likes to work independently - C	Inspire others to do their best & very optimistic - I
Operate "By the book" - C	Like stability - S
Results driven - D	Relates/connects well with others, even a new acquaintance - I
Needs to have challenge in their environment/role - D	Values long term relationships - S
Not a fan of chitchat. Get to the point - D	Likes harmony - S
Task Oriented - C	

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Working with the DiSC Styles

Write down the **DiSC®** style of someone you want to work with more effectively.

- Ask yourself...
 - Are they more **fast-paced** or **cautious**?
 - Are they more **questioning** or **accepting**?



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Working with DiSC® Styles

D Style	
Results, Action, Challenge	
<u>What's difficult</u>	<u>What works</u>

i Style	
Enthusiasm, Action, Collaboration	
<u>What's difficult</u>	<u>What works</u>

C Style	
Accuracy, Stability, Challenge	
<u>What's difficult</u>	<u>What works</u>

S Style	
Support, Stability, Collaboration	
<u>What's difficult</u>	<u>What works</u>

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UNDERSTANDING OTHERS

D-i-S-C Values to the Team

D's Generate ideas and get results

I's Promote and sell the ideas

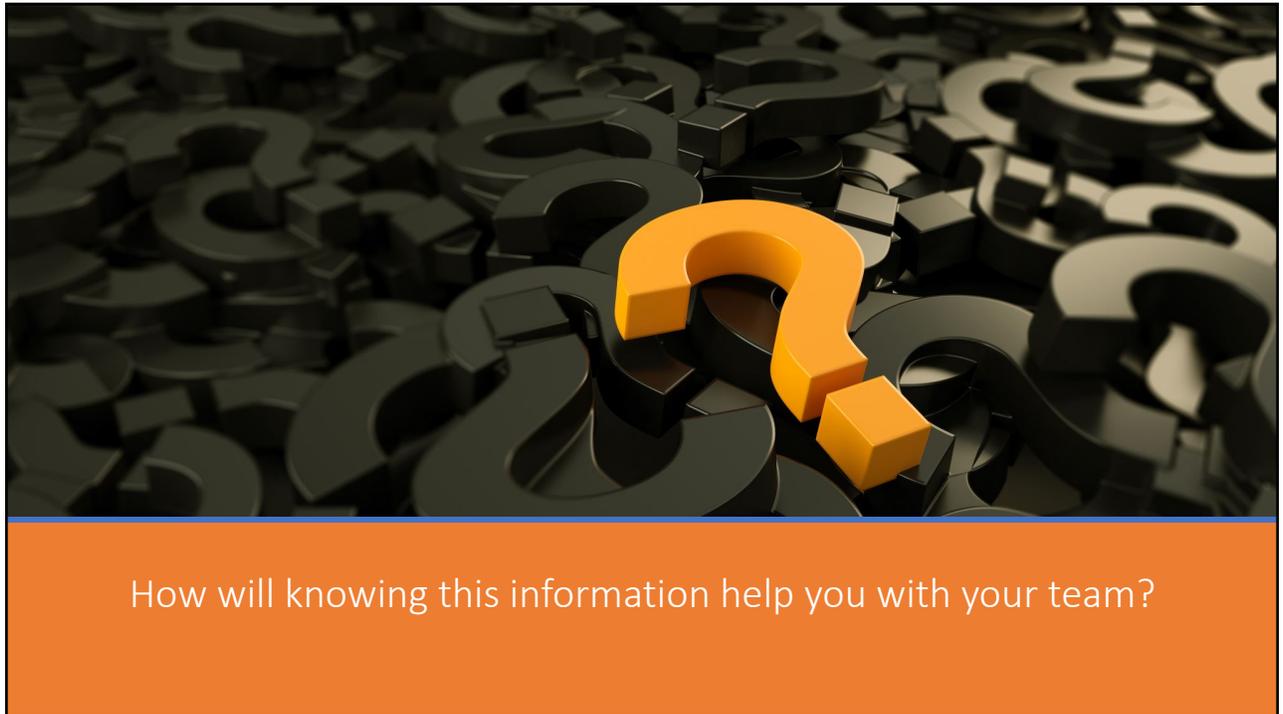
S's Make certain the ideas are carried out and bring stability to the group

C's See to it certain key details are covered and the project is well done

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D Style (Problems)	I Style (People)
Priorities: Results, Action, Challenge	Priorities: Enthusiasm, Action, Collaboration
Contributions: <ul style="list-style-type: none"> • Pushes for results • Shows decisiveness • Displays confidence • Conveys urgency • Speaks up about problems 	Contributions: <ul style="list-style-type: none"> • Generates enthusiasm • Creates a lively environment • Is eager to get things started • Gets everyone involved • Connects with others
S Style (Pace)	C Style (Procedures)
Priorities: Support, Stability, Collaboration	Priorities: Accuracy, Procedures, Challenge
Contributions: <ul style="list-style-type: none"> • Listens and provides support • Team player • Accommodates different people & ideas • Remains calm and tactful • Shows patience 	Contributions: <ul style="list-style-type: none"> • Strives for reliability • Ensures accuracy • Provides logical analysis • Questions ideas • Maintains high standards

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Speaking DiSC with Customers

Communicating with a high D:

- Be quick, focused and to the point.
- Don't ramble on or waste their time.
- Don't come with decision made or make it for them.
- Don't try to build personal relationships or chitchat.
- Present a win-win strategy.
- Come prepared and organized.

Communicating with a high I:

- Provide ideas for implementing action.
- Focus on people and action items.
- Put details in writing.
- Ask for their opinion.
- Don't leave decisions up in the air.
- Don't drive facts, figures and alternatives.
- Incorporate personal.
- Be positive.

Communicating with a high S:

- Start with personal questions. Break the ice.
- Present your case in a logical, soft and non-threatening way.
- Don't threaten with positional power or be demanding.
- Don't interrupt as they speak. Listen carefully.
- Show sincere interest in them.

Communicating with a high C:

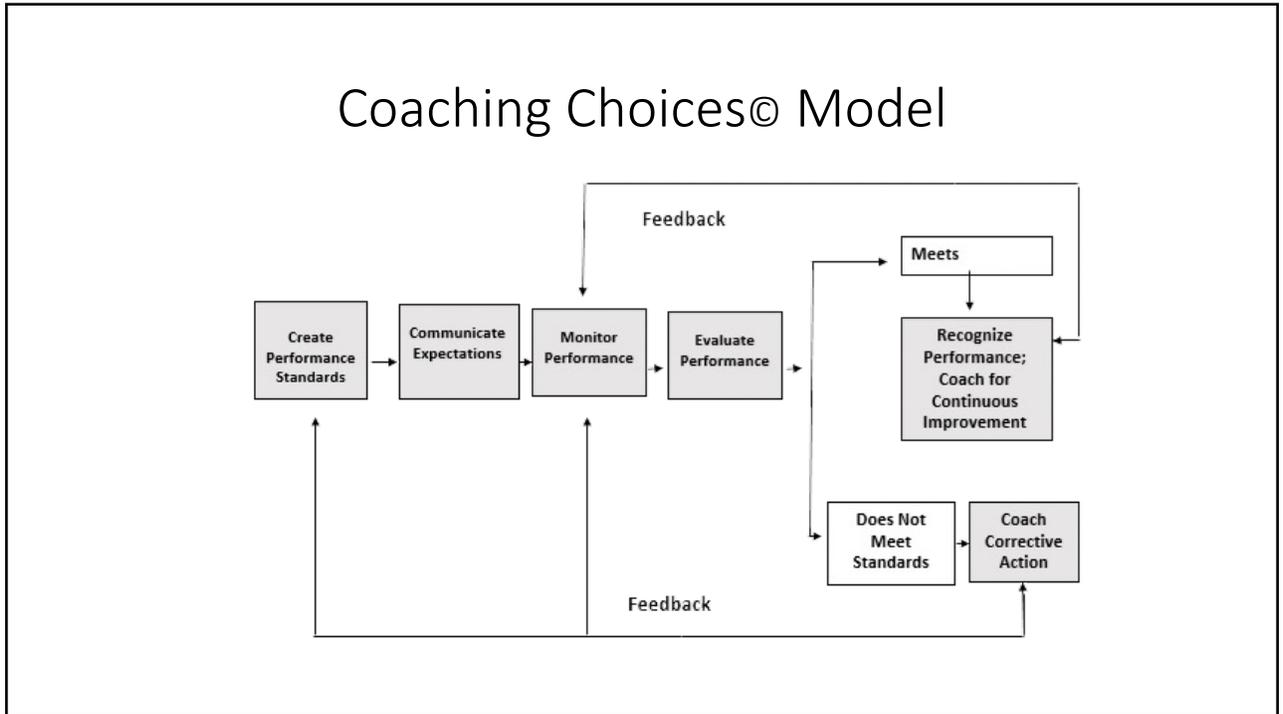
- Allow them their space. Don't touch them.
- Don't be disorganized or messy.
- Don't force a quick decision. Give them time.
- Don't be vague about expectations or fail to follow through.
- Prepare your case in advance.
- Approach them in a straight-forward, direct way.

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**Excelling at
Leading
Supervising
Coaching**



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"When you were made a leader you weren't given a crown, you were given the responsibility to bring out the best in others." - Jack Welch, Former CEO of GE

Your role as a supervisor

23

Knowing the mission, purpose and your WHY.

"Without a mission statement, you may get to the top of the ladder, and then realize it was leaning against the wrong building." - Dave Ramsey

If you're not working with purpose, you're doing it wrong.

Operating from your **WHY**, not your what.
It's not what you do that matters, it is **WHY** you do what you do that matters!

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Motivation

Know your WHY

Source: The Motive

	<i>ENJOYMENT</i>	<i>IMPORTANCE</i>
<i>Financial Performance</i>	5	3
<i>Driving Marketing & Sales</i>	1	2
<i>Handling the Board</i>	3	5
<i>Leading & Managing</i>	4	4
<i>Interacting with key customers</i>	2	1

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Leader

Anyone who takes **responsibility** for finding the **potential** in **people** and **processes** and has the **courage** to develop that potential.

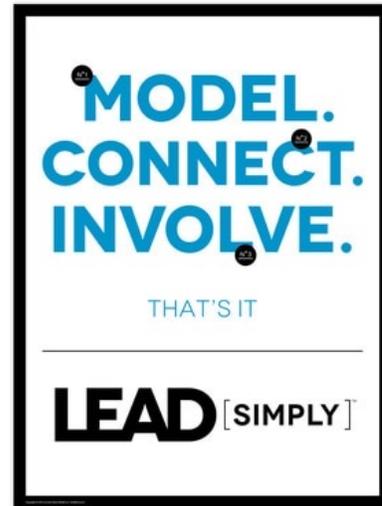
Brene' Brown

26

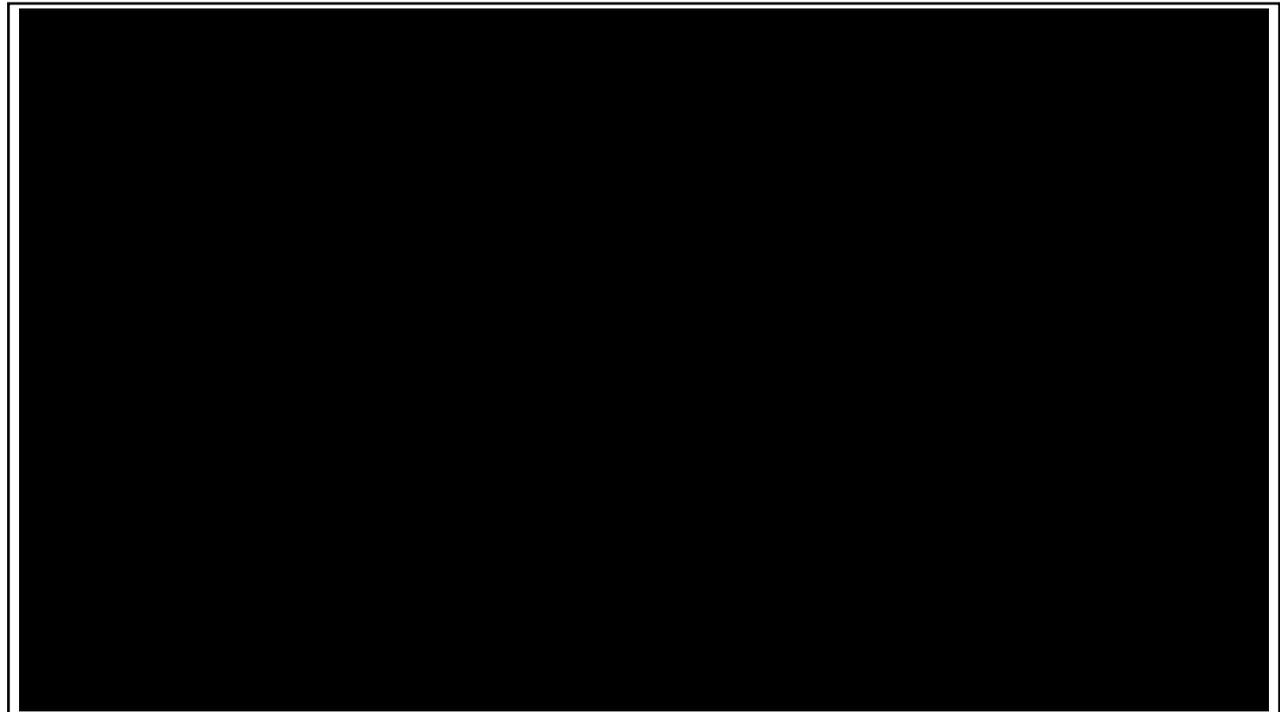
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LEAD SIMPLY

- What am I modeling?
- When am I connecting?
- How am I involving?



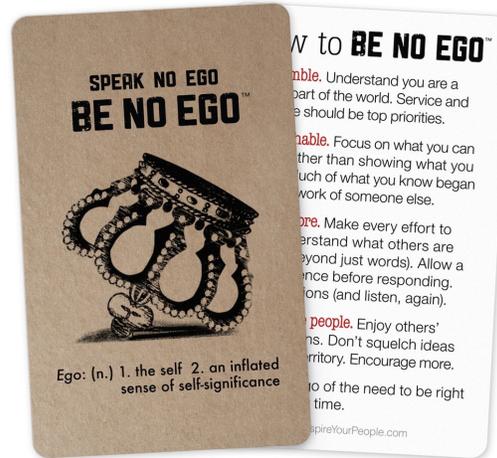
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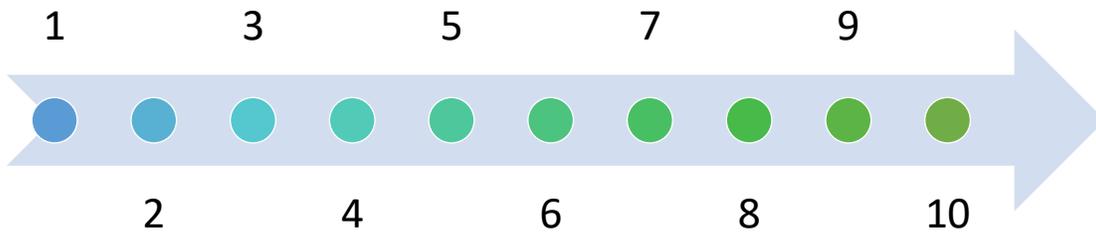
How to be no Ego

1. Humble
2. Teachable
3. Listen More
4. Appreciate People
5. Relax



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Self-Evaluation



30

30



Appearance

Positive Attitude

Good Work Habits

Communication Skills

Managing Professional Presence

31



*How Do YOU
Want To Be
Perceived?*

32



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ONE TEAM
People working together as a lean, global enterprise for automotive leadership, as measured by:
Customer, Employee, Dealer, Investor, Supplier, Union/Council, and Community Satisfaction

ONE PLAN

- Aggressively restructure to operate profitably at the current demand and changing model mix
- Accelerate development of new products our customers want and value
- Finance our plan and improve our balance sheet
- Work together effectively as one team

ONE GOAL
An exciting viable Ford delivering profitable growth for all

Expected Behaviors

Foster Functional and Technical Excellence

- Know and have a passion for our business and our customers
- Demonstrate and build functional and technical excellence
- Ensure process discipline
- Have a continuous improvement philosophy and practice

Own Working Together

- Believe in skilled and motivated people working together
- Include everyone; respect, listen to, help and appreciate others
- Build strong relationships; be a team player; develop ourselves and others
- Communicate clearly, concisely and candidly

Role Model Ford Values

- Show initiative, courage, integrity and good corporate citizenship
- Improve quality, safety and sustainability
- Have a can do, find a way attitude and emotional resilience
- Enjoy the journey and each other; have fun - never at others' expense

Deliver Results

- Deal positively with our business realities; develop compelling and comprehensive plans, while keeping an enterprise view
- Set high expectations and inspire others
- Make sound decisions using facts and data
- Hold ourselves and others responsible and accountable for delivering results and satisfying our customers

+
=

PROFITABLE GROWTH FOR ALL

P = R x M

"Turbo Machine"

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Beyond Your Written Policies

1. The “Unwritten Rules” of Your Culture
2. Who Does What
3. Your Core Values
4. How They Contribute
5. Office Gossip

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Employee
Expectations...What
this could look like?

Beyond your written policies...

We Believe in showing up on time

We Believe in owning and learning from our mistakes

We Believe in being an ideal team player

We Believe in maintaining confidentiality

We Believe in acting with professional maturity with every customer and employee interaction

We Believe we should be humfident, which means confident, in a humble sort of way

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Leadership Expectations...What this could look like?

Operationalizing your Values

Show up & take responsibility

Asking for Help

Model the behavior you expect of your team

Managing Commitments to Self & Others

Have those courageous conversations

Developing emotional literacy

Giving & receiving feedback

Building Trust

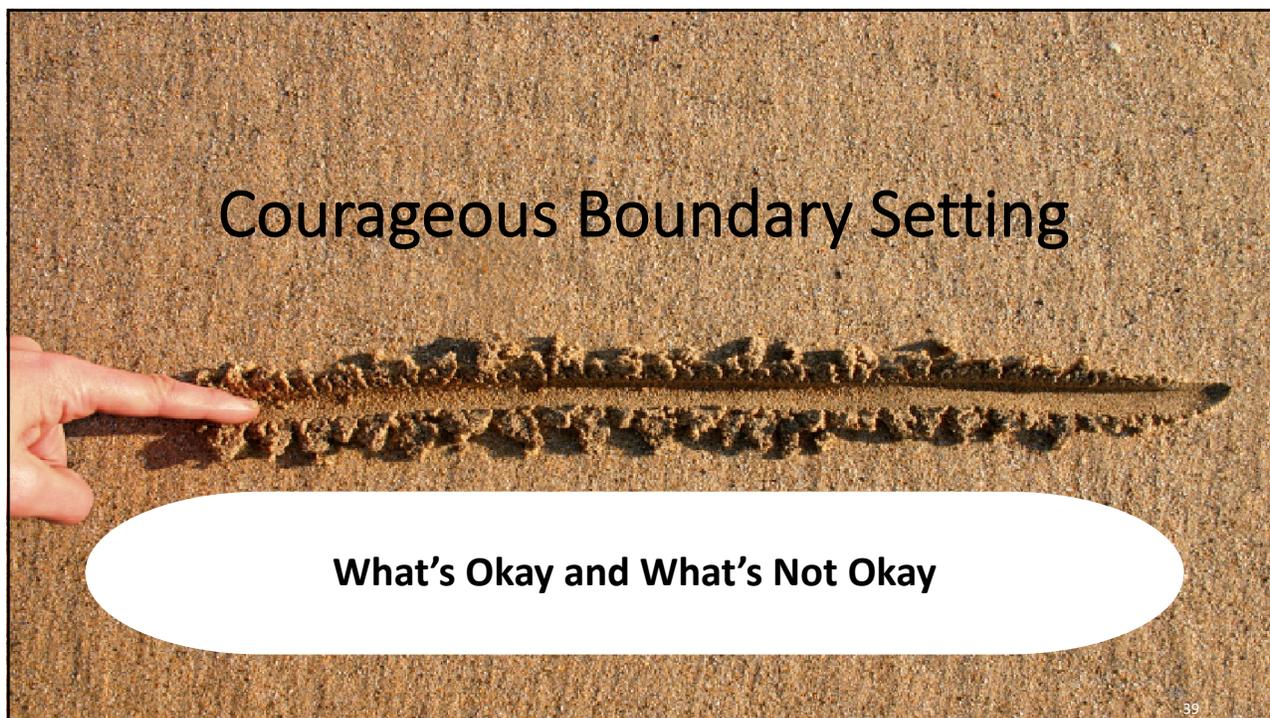
Source: Brene' Brown

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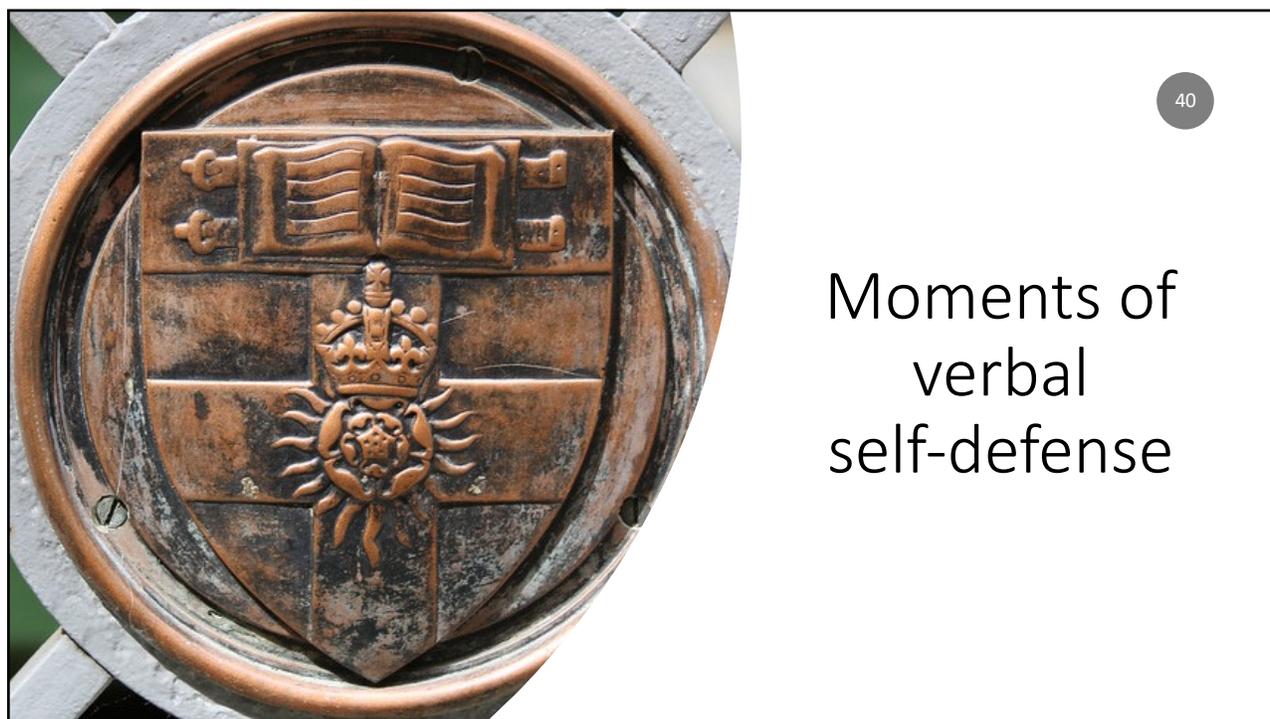


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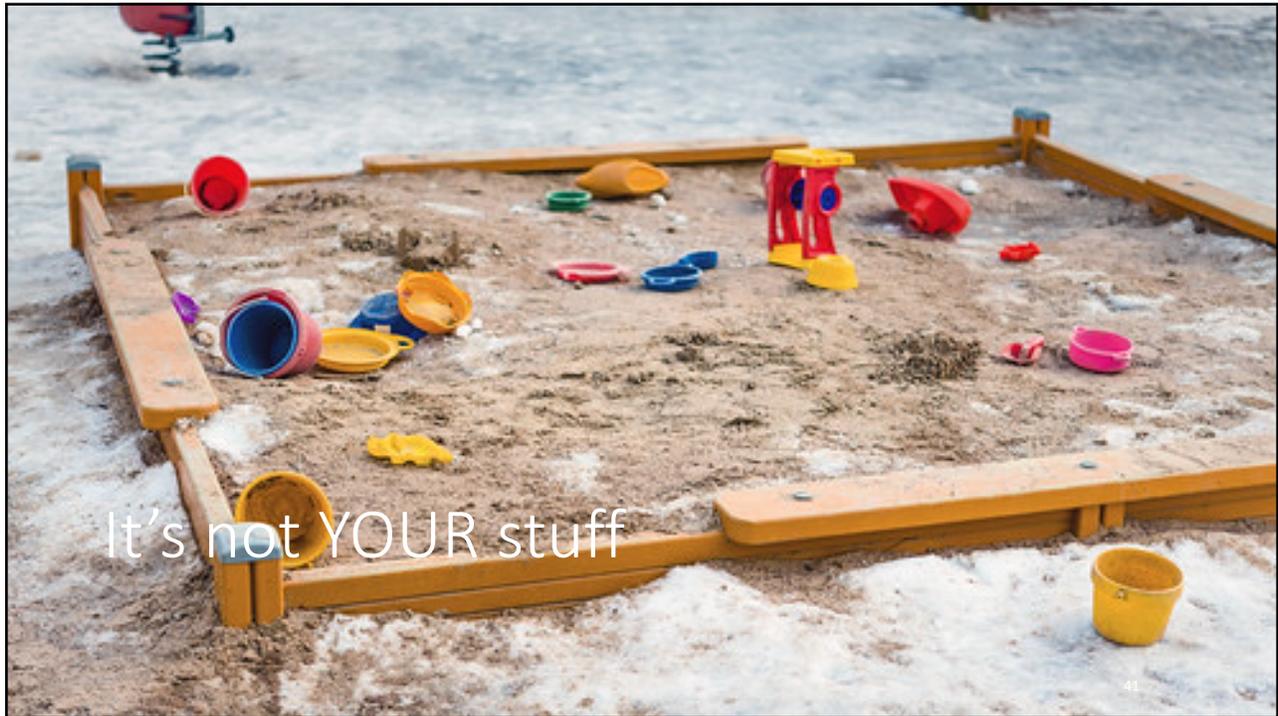
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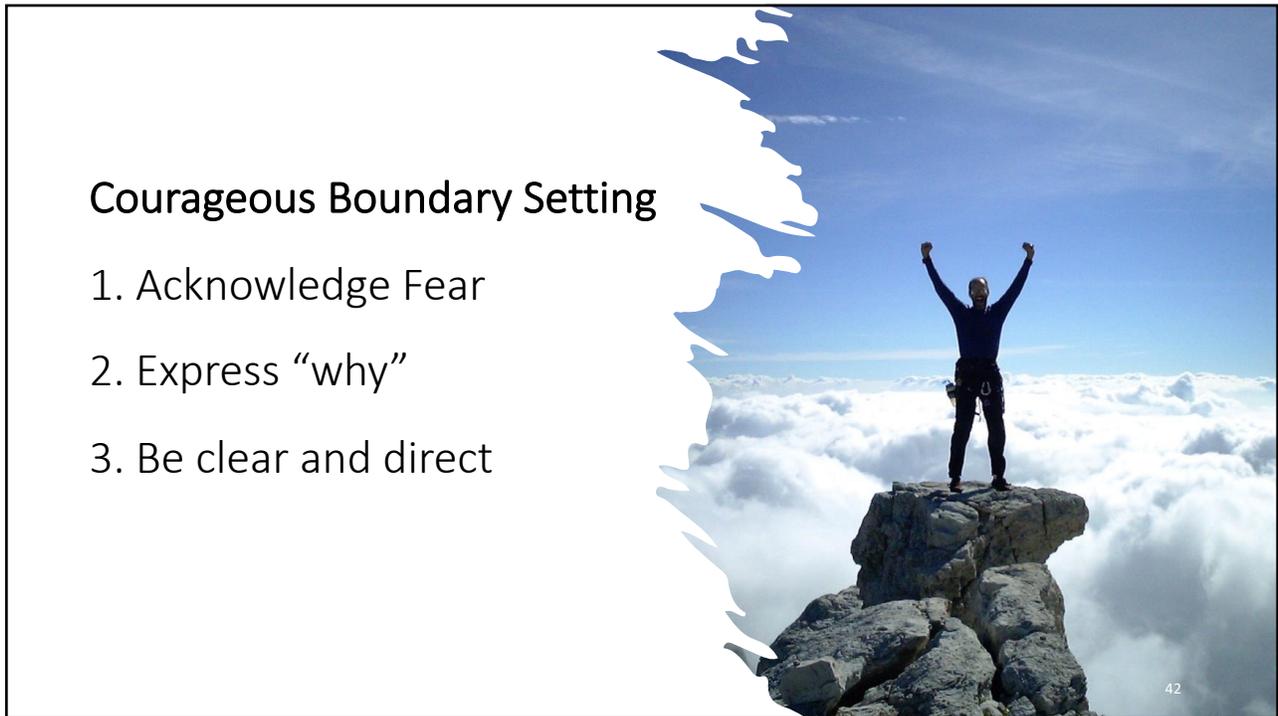
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You have a friend at work who regularly draws you in to office gossip.



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Courageous Boundary Approach

It's hard for me to say this, but I want to be honest with you...

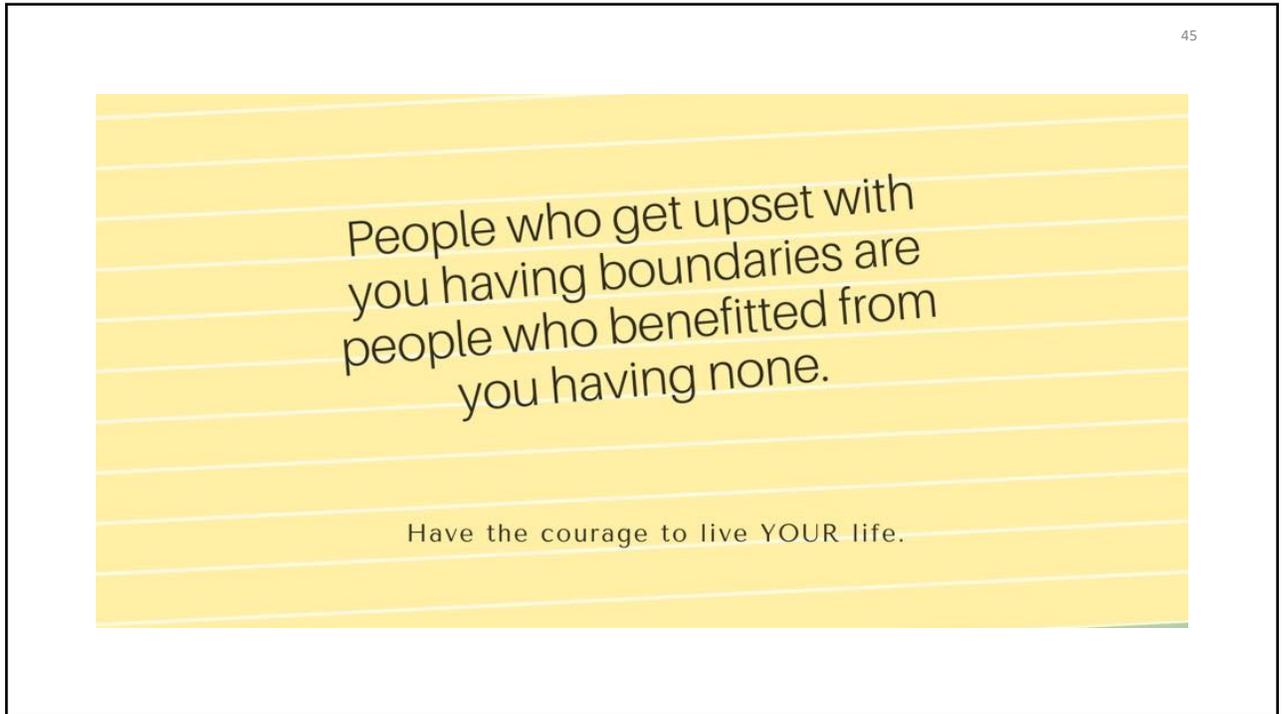
I know that in the past I've...but now I'm trying to...

I'm afraid of hurting you, but the health of our working relationship is important to me, so I want you to know that I can't...

I'm nervous to say this, but I'm making an effort to communicate more authentically with those who are important to me, so I need to tell you...

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Create a Listening Habit

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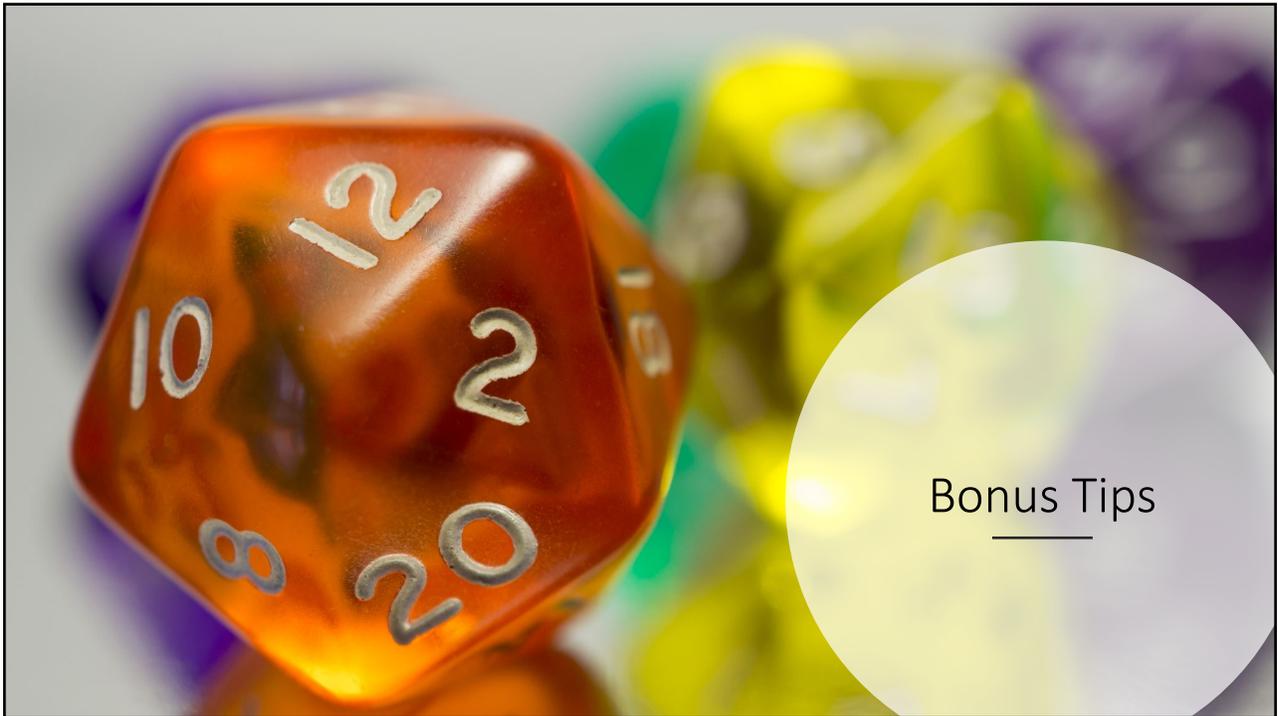
Mature Listening



- Passive – ‘to’
- Active – ‘for’
- Silences internal voice
- Dampens voices of others
- Assigns negative meaning
- Others will stop talking

48

48



49



50



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52



53



- Possibility
- Notice/Wonder
- Help

54

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Learn to Rumble

A rumble is a discussion, conversation, or meeting defined by a commitment

55

55

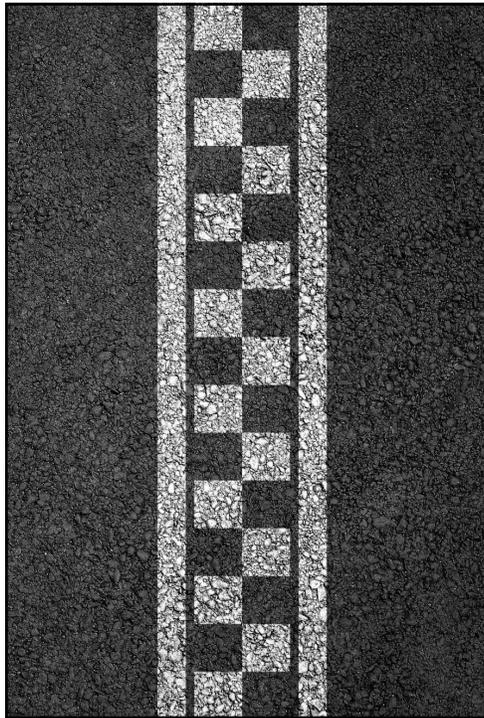


Rumbling with Vulnerability

Vulnerability:
The emotion that we experience during times of uncertainty, risk, and emotional exposure.

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56



Rumble Starters

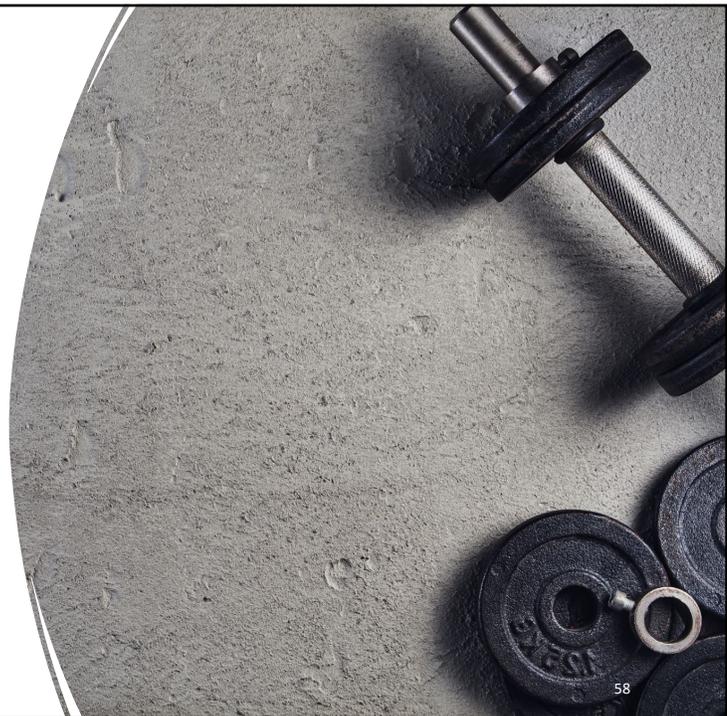
- *The story I make up...*
- *I'm curious about . . .*
- *Tell me more.*
- *That's not my experience (instead of "You're wrong about her, him, them, it, this . . .").*
- *I'm wondering . . .*
- *Help me understand . . .*
- *Walk me through . . .*
- *We're both dug in. Tell me about your passion around this.*
- *Tell me why this doesn't fit/work for you.*
- *I'm working from these assumptions—what about you?*
- *What problem are we trying to solve?*

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Rumbling Exercise

Put together a presentation to teach your team about rumbling.



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58



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What I Know to be True

1. Conflict will happen
2. People don't have the skills
3. Ego gets in the way
4. It takes courage and practice
5. Most people prefer harmony

60

60

<h2>Consequences if Not Addressed</h2>		61
<ol style="list-style-type: none">1. Stress increases2. Performance decreases3. Drama increases4. Relationships are damaged5. Morale tanks		

61

		62
<h2>Identify your Fears</h2>		

62

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*You gain strength, courage, and confidence
by every experience in which you really stop
to look fear in the face.*

Eleanor Roosevelt

63

*Stop avoiding the tough
conversation because you think
you are being polite*

64

64



65



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SELF Examination



The Elevator Principal – “We can lift people up or take people down”

What would others say that I lift them up or take them down?

Source:
Winning with People, John Maxwell

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SELF Examination

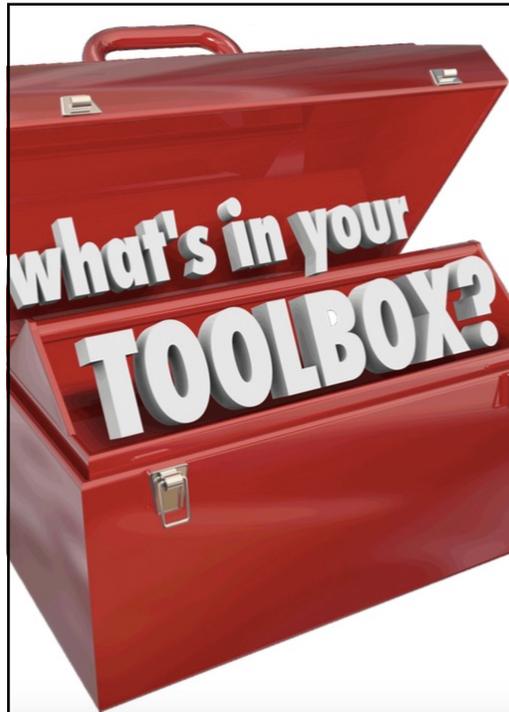
What kind of person are you?

- + Some “add” something to life – we enjoy them
- x Some “multiply” something in life – we value them
- Some “subtract something in life – we tolerate them
- ÷ Some “divide” something in life – we avoid them

Source: Winning with People, John Maxwell

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SELF Examination

What are my strengths?

What are my blind spots?

- Would you buy from you?
- Identifying Needs (Listening skills)

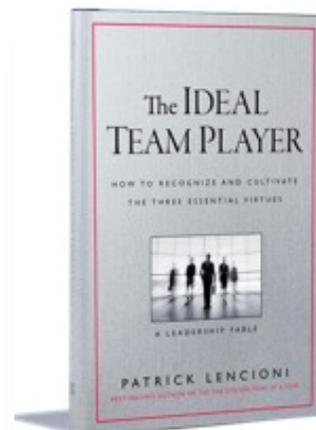
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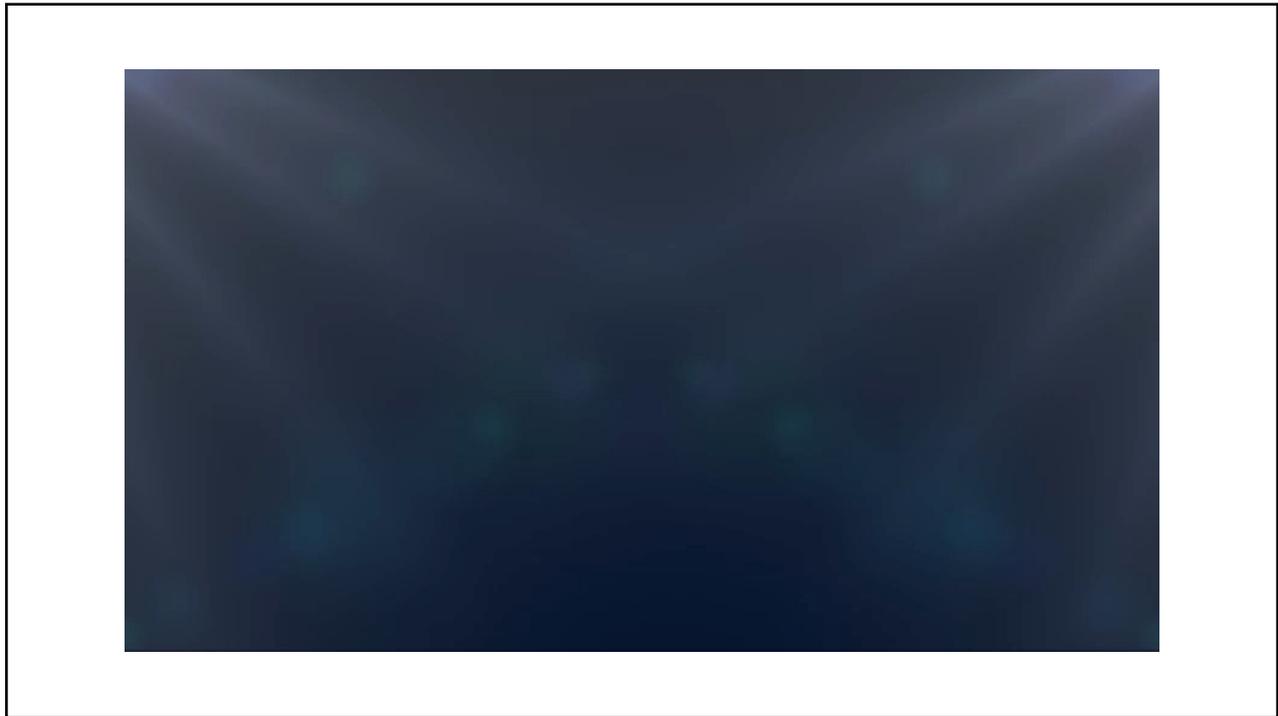
The Ideal Team Player

The concept:

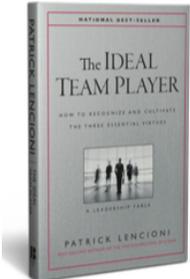
An ideal team player embodies three virtues: humility, hunger and people smarts. The power this combination yields drastically accelerates and improves the process of building high-performing teams.



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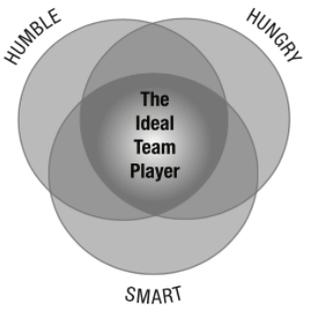


SELF-ASSESSMENT

Instructions: Take this assessment to evaluate yourself relative to the three virtues of an ideal team player. Respond as honestly as possible, as this will allow you to most accurately identify any areas of development that you may have.

Use the scale below to indicate how each statement applies to how you think your teammates may see you and your actions on the team. Choose the rating response number that best applies to each statement and record it in the box to the right of the statement. Then total your scores for each of the three virtues.

Rating Scale: 3 = Usually 2 = Sometimes 1 = Rarely





the table group
a patrick lencioni company

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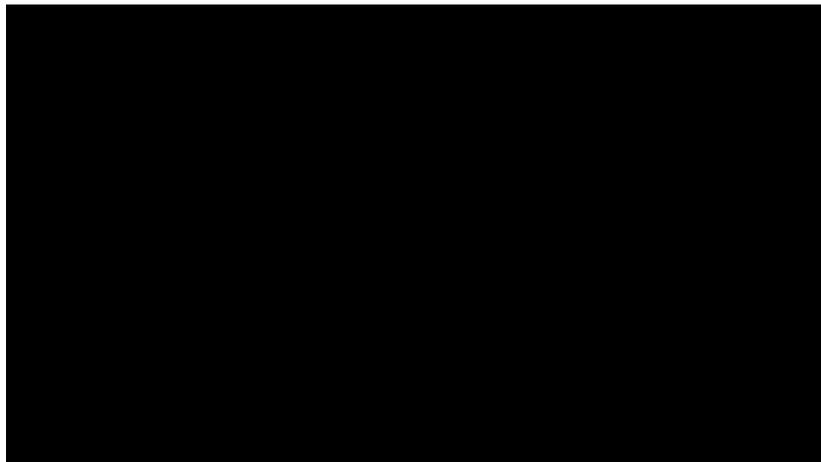
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Assess the Team



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Empathy for Your Team Members – Simon Sinek



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Daring Leadership Assessment

1. Rumbling with Vulnerability
2. Living into our Values
3. Braving Trust
4. Learning to Rise

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76

is
kind.

Stop avoiding the tough conversation because you think you are being polite.

Brene' Brown

77

77



Ideas to Empower & Motivate

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Empower
Motivate
Engage

79% of employees who quit their jobs cite a lack of appreciation as a key reason for leaving.

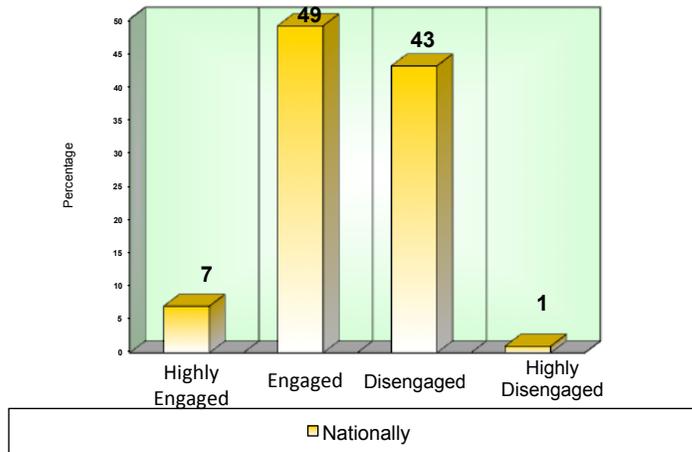
65% of Americans report that they weren't recognized even once last year.



79

79

44 % of the workforce...



80

Components of Job Satisfaction

In simple terms: job and manager

According to Gallup:

Clarity of Expectations

Opportunities for Development

Opinions Counting at Work

81

2 Guiding Principles to Empower & Motivate

1. Culture
2. Investing



82



Create a Motivating Work Environment

JUST ASK!

- *What do you want?*
- *Current Culture*
- *Recognition Survey*
- *Employee Needs Chart*
- *Factors – Employee Morale*

83

"What I hate about working here is that I am inundated with GRATITUDE, PRAISE and APPRECIATION!"

“...said no one ever!”



84



85



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Who is on Your Team?

- **Traditionalists (1928 – 1945)**
- **Boomers (1946 – 1964)**
- **Gen X (1965 – 1980)**
- **Millennials (1981 – 1996)**
- **Gen Z (1997 – 2012)**

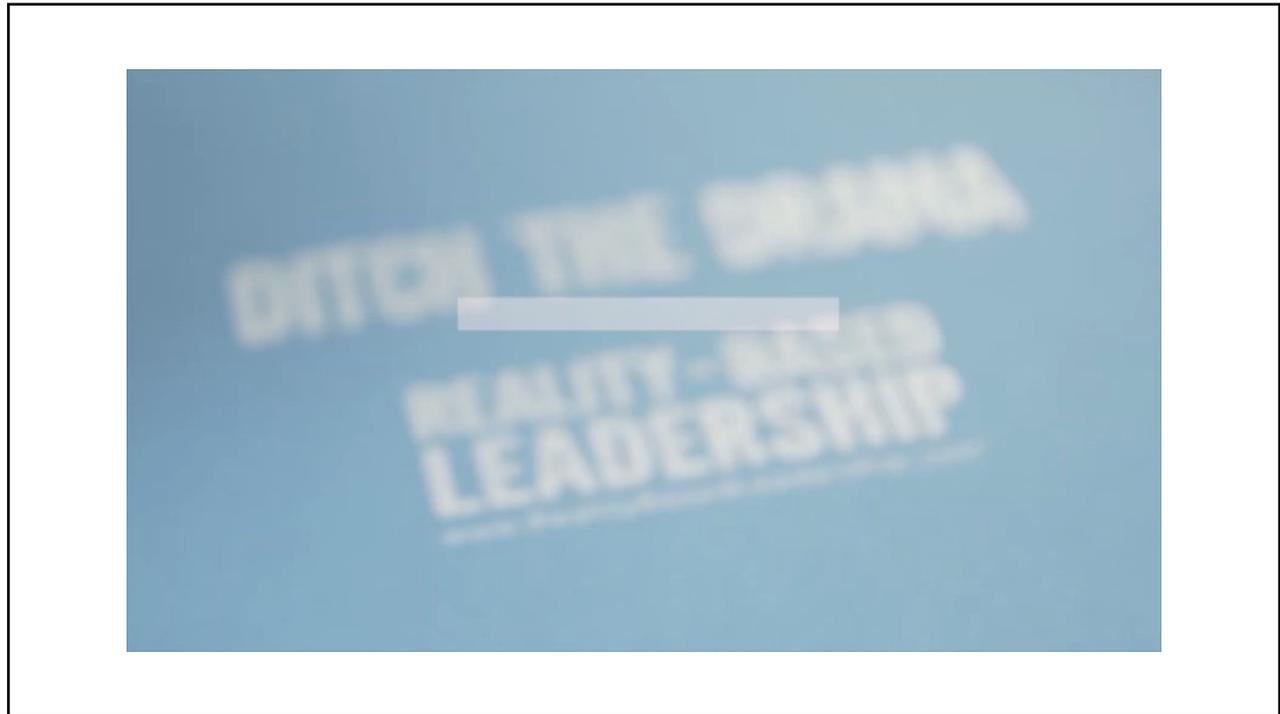


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Millennials at Work

In 2014, Deloitte conducted a [study](#) of 7,800 millennials about their work expectations. The study predicted that, by 2025, 75 per cent of the workforce would be millennials. Deloitte's findings revealed that 70 per cent of millennials thought they would be self-employed, while 50 per cent were unsure of the motives of the businesses they were working for. **Now almost a decade later, some employers are still complaining that they can't get millennials or any youth for that matter, to work.**

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Reality Based
Leadership

- [Cy Wakeman YouTube Channel](#)
- [Cy - Accountability - Skillset or Mindset](#)
- [Cy Explains The Three Lanes if Life](#)
- [Cy - How to Re-engage Employees Who Have Checked Out](#)

Cy Wakeman is a dynamic international keynote speaker, business consultant, New York Times bestselling author, and global thought leader with over 25 years experience cultivating a revolutionary new approach to leadership.

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One-On-Ones: O3s

The slide features a circular inset image on the left showing two women sitting at a table, smiling and talking. They are both holding notebooks and pens. The background of the slide is dark grey with an orange horizontal bar at the bottom. A small circle with the number '91' is in the top right corner.

91

Unclear
is
Unkind

1. Clarify Expectations
2. Create a Training Plan
3. Coach Performance
4. Give Feedback
5. Celebrate Success
6. Repeat

www.interaction-training.com

92

The slide has a green border and a blue-green textured background. On the left, the text 'Unclear is Unkind' is written in a large, black, sans-serif font. On the right, a numbered list of six items is presented, each separated by a thin horizontal line. At the bottom, the website 'www.interaction-training.com' and the number '92' are visible.

92



Supervisor Pledge

- Right
- Responsibility

www.interaction-training.com

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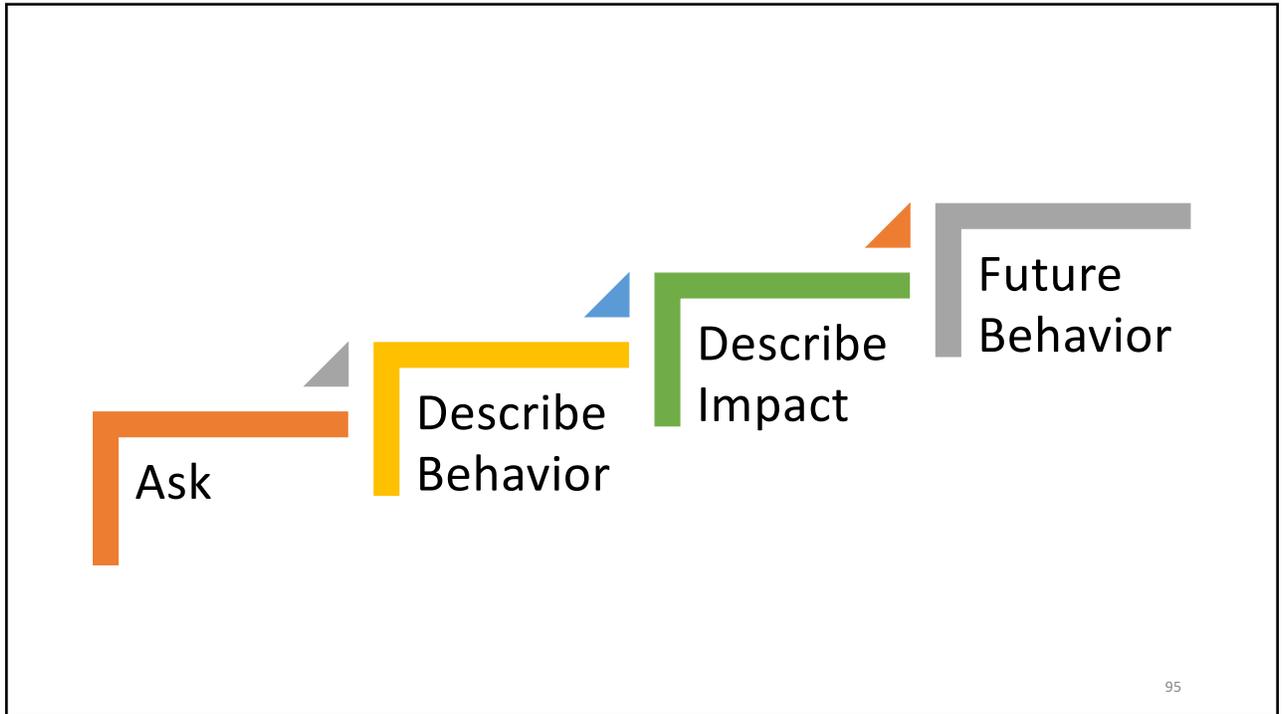
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Feedback

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94



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97

Developing Coaching Skills

97



98

Coaching is Guiding

98



Coaching is Encouraging

99

99



Coaching is Addressing

100

100



Coaching is Recognition

101

101



Coaching is Growth |

102

102



103



104

104



105



106



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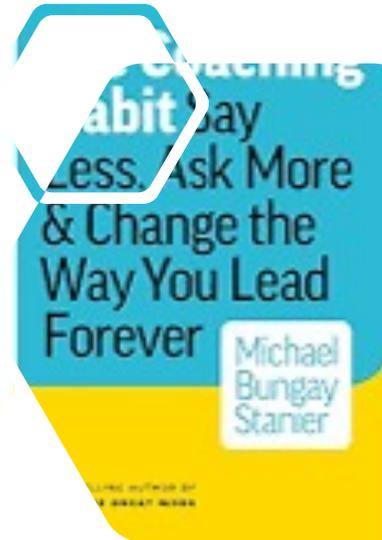
109



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“It takes courage to ask a question rather than offer up advice, provide an answer or unleash a solution”

Brene’ Brown



111

WDEP System

W

- Discuss Wants and Perceptions

D

- Discuss Direction and Doing

E

- Encourage Self-Evaluation

P

- Formulate a Plan of Action

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112



113



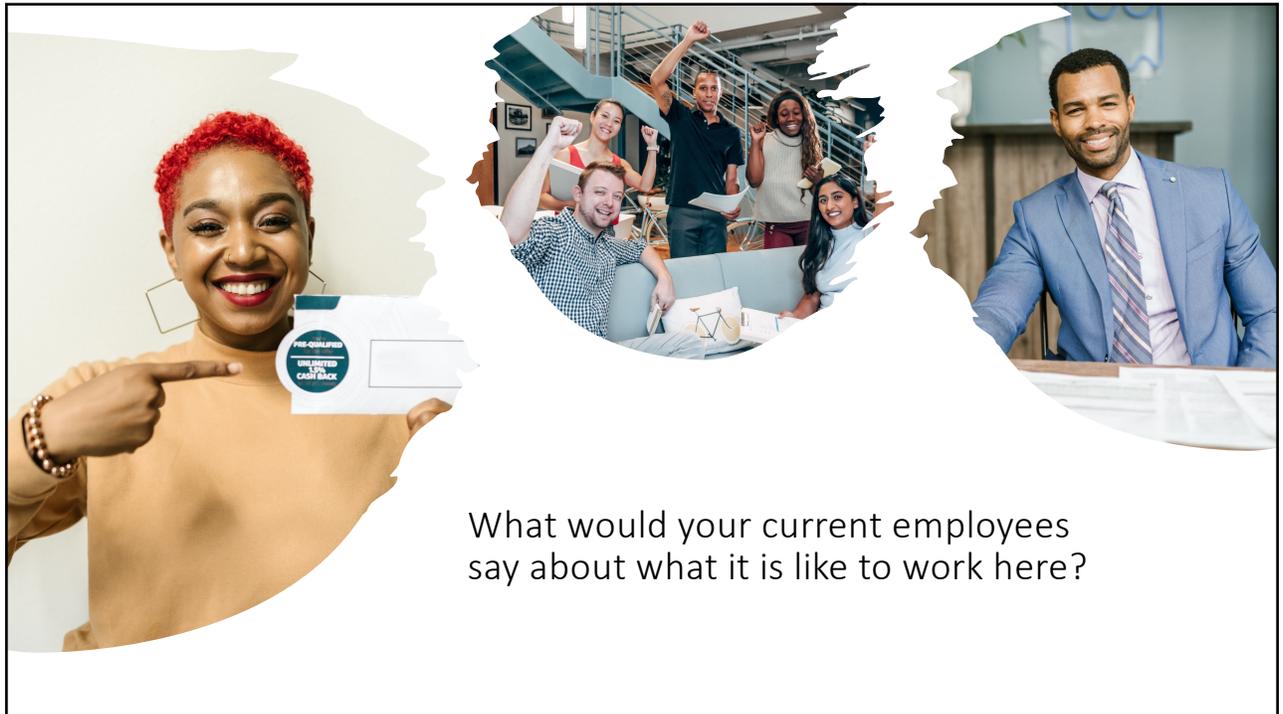
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Looking for a new gig? Well, you're in luck.

Firespring, one of Nebraska's fastest-growing companies, is looking for a rock star to join our crew. In corporate speak, we provide creative, print, interactive and strategic solutions for nearly 9,000 brands, businesses and nonprofits all over the world. But nobody gets excited about corporate speak, so here's the real scoop.

- We bask in the Silicon Prairie, with offices in Lincoln and Omaha, Nebraska and Council Bluffs, Iowa.
- Firespring only hires passionate, ambitious people—the type who "bring it" every day, have each other's back and truly give a shit.
- With clients in all 50 states and 12 countries across six continents, you could say we get around.
- Inc. Magazine named us one of 50 honorees nationwide for their inaugural Best Workplaces Award in 2016.
- We love to give back to the community. In fact, Firespringers receive a paid day off every month to volunteer for a nonprofit of their choice.
- In 2014, we became the first Certified B Corporation in Nebraska, joining 2,000+ companies leading a global movement to redefine success in business.
- Our B Corp status cements our core purpose of leveraging our people, products and profit as a force for good.

That's the skinny on who we are. Now we want to tell you about who we're looking for.

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Compensation and Benefits

- **Salary**—You don't need to go to the grocery store to bring home the bacon. We reward candidates who wow us by offering competitive pay.
- **Vacation**—Paid holidays are a no brainer, but how does unlimited, paid vacation sound? Too good to be true? It's not. Salaried employees of Firespring are encouraged to take what they need when it comes to vacation and sick time.
- **401(k)**—Your parents preached about the importance of saving. Now we're helping you get it done. Firespring provides professional financial advisors who will help you make a plan and guide your investments.
- **Fun**—Millions of people go to work, punch the clock from 8 to 5 and hate every moment of it—that's not the case here. We have an indoor slide, a game room that includes shuffleboard, a pool table, a foosball table, a ping pong table and more. To put it mildly, we're serious about having fun.
- **Miscellaneous Benefits**—Not all benefits are about the Benjamins, baby. Some of the things you'll enjoy while working here include unlimited soda, tea, lemonade, and beer. And don't worry about your duds—business-casual is the dress code here. Still looking to make your cubicle-shackled friends jealous of your new gig? Our company-wide social and recreational activities are sure to do just that.

Ready to come aboard?

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Home > About Us

Who We Are

We enjoy long, quiet walks on the beach, puppies and romantic dinners. Nah, we're too old for all that, but we're still pretty cool, and we do actually love puppies. As a community bank, we make it a priority to give back to the customers and communities we serve through charitable giving and volunteer opportunities. Please explore this section to learn about our upcoming events, donations, career opportunities, news, blogs, and more!

Careers At FBFC

When you join the First Bank Financial Centre team you'll discover a supportive environment that offers opportunities for both personal and professional growth, competitive wages and outstanding benefits. We even have a Top Workplace award from the Milwaukee Journal Sentinel to prove it. Actually we have seven! Let us prove our commitment to you. Explore the information below to see if FBFC is the right fit for you.

121

Typical Job Descriptions for a teller or CSR

POSITION PURPOSE

Perform numerous functions including processing deposits, withdrawals, posting to general ledger accounts, cashing negotiable items, processing loan payments, savings bonds, and cashier's checks while promoting the bank's products and services and providing excellent customer service.

ESSENTIAL FUNCTIONS AND BASIC DUTIES

- **Assumes responsibility for the efficient, effective, and accurate performance of Teller functions.**
 - Represents the bank in a courteous and professional manner.
 - Receives and processes deposits.
 - Receives and processes loan payments.
 - Cashes checks and other negotiable instruments for clients.
 - Examines documents for endorsements and negotiability.
 - Processes transfers between accounts..
 - Processes credit card cash advances.
 - Verifies and balances cash daily.
 - Detects and resolves discrepancies promptly.

Essential Functions:

- Accurately process all financial transaction.
- Maintain and balance a cash drawer.
- Provide prompt, accurate, courteous, friendly, timely, and professional service.
- Learn and maintain knowledge of credit union products and services.
- Understand and follow all credit union policies and procedures relevant to the teller position.
- Complete and adhere to compliance training.
- Maintain regular and reliable attendance and timeliness.

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As a Bank Teller, a typical day will involve the following:

- Processing customer transactions
- Suggest products and services and recognize needs
- Balancing and branch operational procedures
- Putting your smile to use by providing exceptional service.

This might be your next gig if:

- You enjoy customer service and pride yourself on delivering the best of the best. You like helping people and are patient.
- You pay attention to details. You have the attitude that anything worth doing is worth doing right, every single time. You stay determined.
- You like to learn new things and learn quickly. When things change, you can roll with the punches.
- You communicate clearly. Speak graciously. You can explain things to just about anyone.

We pride ourselves on being pretty accommodating but to secure this role we have some things we are passionate about. You will need to have some experience in providing great customer service.

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Benefits

Pulled from the full job description

- Loan repayment program
- Health insurance
- Dental insurance
- 401(k)
- Flexible spending account
- Tuition reimbursement
- Paid time off
- Parental leave
- Employee assistance program
- Vision insurance
- 401(k) matching
- Employee discount
- Professional development assistance
- Life insurance

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HERE COME THE BENEFITS



401K & Matching

We don't want to just invest in you, we want to invest in your future.



Work Hard Play Hard

At Five Nines, we are highly motivated to work hard, but if we can't play foosball, shoot nerf guns or partake in a friendly game of TF2 together, how can we expect to sit next to you all day in an office?



PTO/Holiday

In your first year your vacation day target is 15 days, you're supposed to hit that. Everyone needs their R&R to be on top of their game.

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Success (Profit) Sharing

People are our biggest resource, it only seems right to share our success.



Work From Home

Enjoy staying in your pajamas all day on your big comfy couch? Great, we like flexibility too, enjoy one day a week to work from home!



A Rapidly Growing Company

We are growing crazy fast, fast enough to make the Inc 5000 list 6 years running.

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Company Smartphone & Internet Stipend
We're a tech company, this seemed more than fitting.

Insanely Smart People Sharing Knowledge
Top talent wants to work with top talent. Here you will have the chance.

Continuous Education
Stay sharp and broaden your knowledge base, achieve new heights with further education.

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Random Donut Deliveries
Familiar with Krispy Kreme? So are we. At Five Nines, they come in deliveries of dozens upon dozens.

Health Insurance
We want you & your family to be healthy. We offer extensive health insurance options as well as eye and dental insurance.

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What You'll Do: As a Customer Service Representative, you will use your unique skills to expand relationships with current customers by identifying financial needs, processing transactions efficiently and offering appropriate products or services. You will assist customers with deposits, withdrawals, the purchase of treasurer's checks, money orders, balancing a cash drawer and/or ATM transactions on a daily basis with minimal errors. In addition, must strive to resolve customer issues with little guidance and consistently complete transactions with minimal errors. Anticipated schedule: Monday - Saturday per business need as determined by manager.

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Requirements: Minimum of one year of customer service/teller experience preferred but willing to train an individual who is flexible, willing to learn, and has had prior customer service and cash handling experience. Applicants must be able to work as a team player, punctual in arrival, and comfortable using computers and have experience utilizing e-mail applications and/or teller/banking software. High School diploma or GED required.

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Preferred Skills

Skill in communicating with clients and co-workers in courteous and professional manner.

Skill in operating computer terminals and printers, back counter capture machine, coin machine and copie.

Skills in effectively listening to customers and making appropriate referrals.

Ability to maintain a high level of confidentiality.

Ability to perform customer service duties and provides leadership and guidance to subordinate members of the department in the areas of phone and in-person inquiries, conducting customer research, cash and check handling, and effectively making appropriate customer referrals to other bank staff.

Ability to ensure that appropriate efficiency, accuracy, and customer service is provided to customers to ensure that the bank's goals of meeting the customers needs is being met.

Ability to demonstrate accuracy and efficiency in a fast-paced environment.

Ability to function as a team player.

Ability to perform any other duties/projects as assigned by management.

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Develop questions that focus on your desired attributes

RelationshipBuilding
 Flexibility
 ConflictManagement
 PeopleFocus
 ManageRoutines
 DetailOriented
 StressTolerance

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MindTools
Essential skills for an excellent career



Worksheet

Interview Questions

- For training on competency-based interviewing, visit www.mindtools.com/rs/HiringPeople.

Get-To-Know-You Questions

- What have you accomplished in the past that makes you particularly qualified for this position?
- What motivated you to be interested in this position?
- How would your last supervisor describe you?
- What aspects of your last job did you really like?
- What are some job responsibilities you do not like?
- How do you know when you have done a good job?
- What is your overall philosophy when managing or supervising others?
- How would you describe your basic leadership style?
- What is your long-term career objective?
- What areas do you need to further develop in order to meet your career goals?

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Competency Questions

General

- What do you find difficult in your current job?
- What tasks or activities do you find interesting?
- What do you spend most of your time doing?
- What excites you about this new role?
- What worries you about it?

Communication

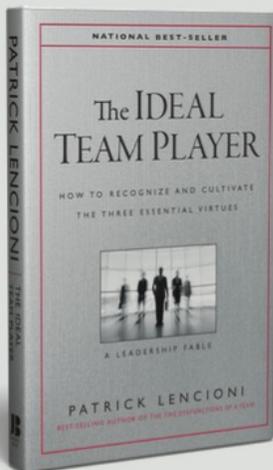
- Discuss a time when you had to assert yourself or speak up in order to get a point across that was important to you.
- Have you had to “sell” an idea to your co-workers, classmates or group? How did you do it? Did they “buy” it?
- How do you ensure that someone understands what you are saying? Tell me about a time when you had to use these skills in the workplace.
- Describe a situation where you missed important details that were communicated to you. What was the outcome? How did you resolve the situation?
- Describe an example of when you jumped into a task or project before you fully understood the entire concept.
- Give me an example of a time when you were unclear about the directions given to you for a work assignment. What did you do to clarify the directions? What was the outcome?
- Tell me about a time when you had to make a presentation to a large group.

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Problem Solving/Analytical Skills

- Describe a difficult problem that you tried to solve. How did you identify the problem? How did you go about trying to solve it?
- Describe a major project that you worked on where things did not go exactly as planned.
- Tell me about a time when you had to identify the underlying causes of a problem.
Describe an instance when you had to think on your feet to extricate yourself from a difficult situation.
- Describe a time when you anticipated potential problems and developed preventative measures.
- Tell me about a time when your manager was unavailable and you had to solve an immediate problem. What did you do and what was the outcome?
- Give me an example in which you failed to come up with a solution to a problem. What caused the failure? What would you do differently next time?

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HIRING IDEAL TEAM PLAYERS:
AN INTERVIEW GUIDE TO HELP YOU
IDENTIFY CANDIDATES WHO ARE
HUMBLE, HUNGRY AND SMART

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HUMBLE

Humble team members are quick to point out the contributions of others and slow to seek attention for their own. They share credit, emphasize team over self and define success collectively rather than individually.

Question: Describe your current team. What do you like and dislike?

Insight: By asking a team related question, it may be apparent if he or she values a team effort and is willing to do what is necessary for the good of the team. Encourage the candidate to describe specific interactions with colleagues and experiences working on a team.

Question: What are the most important accomplishments of your career?

Insight: Look for more mentions of *we* than *I*. Of course, it isn't about being so simplistic as to count the responses. In the event that someone refers to himself or herself individually more than as a member of a team, probe for whether he or she was working alone or with others.

Question: What was the most embarrassing moment in your career? Or the biggest failure?

Insight: Look for whether the candidate celebrates that embarrassment or is mortified by it. Humble people generally aren't afraid to tell their unflattering stories because they're comfortable with being imperfect. Also, look for specifics and real references to the candidate's own culpability.

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Show & Tell

Share your best practices for hiring



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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 your choose, describe what you would do:

My favorite snack is:

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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

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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	

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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 Kraai	8:00 AM Bank Overview - continued & Checklist/Vicki Kraai	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 Kraai	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 Kraai	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 Kraai	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				

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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			

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Show & Tell

Share your best practices for performance reviews.



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<i>Strengths</i>	<i>Areas of Growth</i>

What's Next?

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How to Keep in Touch

- karen@karenbutchercoaching.com
- 859-421-3484
- interaction-training.com (free resources)



The logo for InterAction TRAINING features a teal diamond shape with two white arrows pointing towards each other. To the right of the diamond, the word "InterAction" is written in a large, teal, serif font, and the word "TRAINING" is written below it in a smaller, teal, sans-serif font.

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