



Onboarding in a Box

The “Secret Sauce” to a Successful Experience



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“Onboarding in a Box Series” discussed in this presentation is the current version with effective date of October 22, 2020.

The comments today are my own and not necessarily those of Vizo Financial or the Vizo Financial membership.

Engagement Tools

Poll Questions...

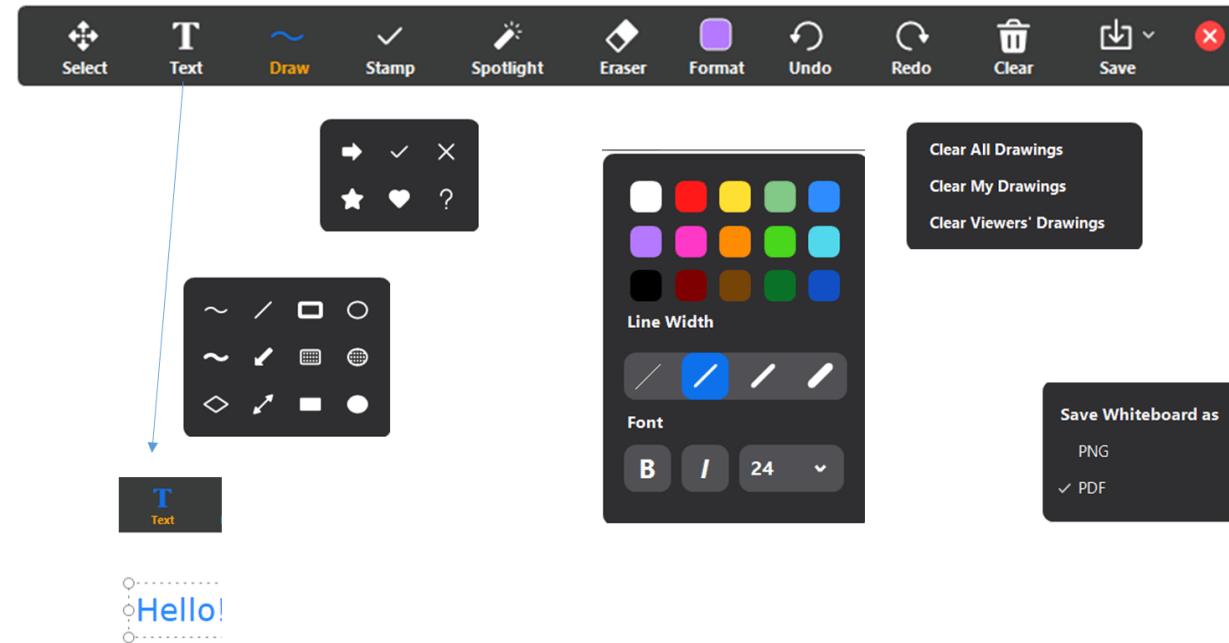
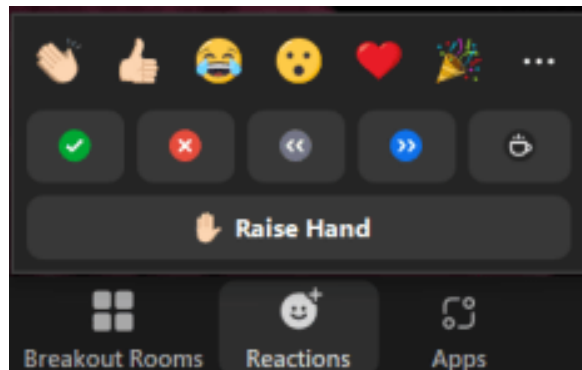
Poll questions will appear on your screen. Select the answer you wish to submit.

Want to chat...

Select the **Chat** button at the bottom of your screen. The chat box will open, ensure **Everyone** is your audience and type in the text field.

Raise your Hand/React...

Select an option from the **Reactions** button at the bottom middle of your screen. To lower your hand, click the Raise Hand button a second time.



Using the Whiteboard...

Select an option from the Annotations bar. To type, click on Text icon, click on the whiteboard and type what you want to say. Click on the text you've just written to submit your answer for all to see.





Onboarding in a Box

- **Session One-First Impressions**
- **Session Two-Difference Makers!**
- **Session Three-Sustained Success**

First Impressions

“You never get a second chance to make a first impression.”

-Will Rogers

First Impressions



Modern and accurate website to show relevance



Clear mission statement



Include an "About Us" page

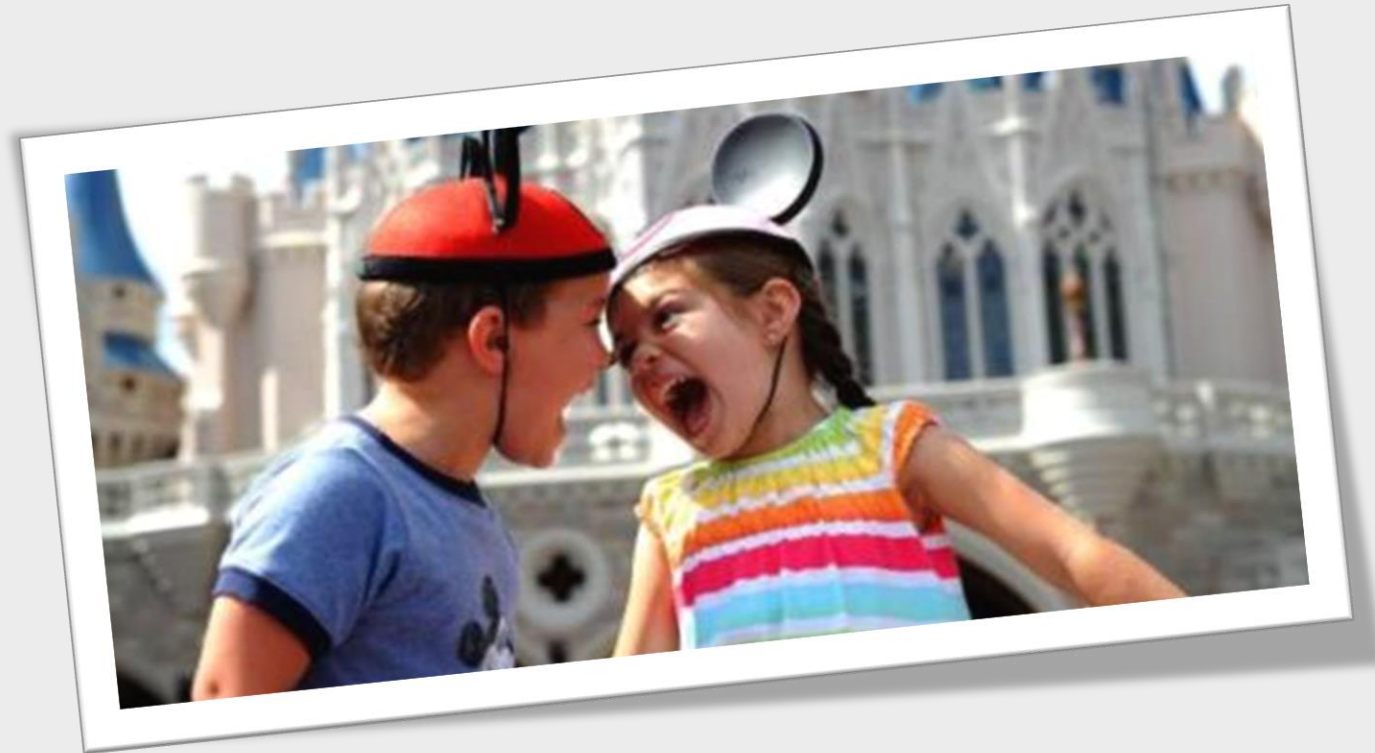


Include actual photos

Employee Value Proposition

*Join us to make a difference in the Credit Union
Movement. Stay because you are valued,
respected and cared for.*

Building
Excitement!



We've Been
Expecting You!



Behind the Scenes



**This is
where the
magic
happens!**

What's Next?

- Difference Makers!