



Onboarding in a Box

The “Secret Sauce” to a Successful Experience

Session Two-Difference Makers!



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“Onboarding in a Box Series” discussed in this presentation is the current version with effective date of October 21, 2021.

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

Engagement Tools

Poll Questions...

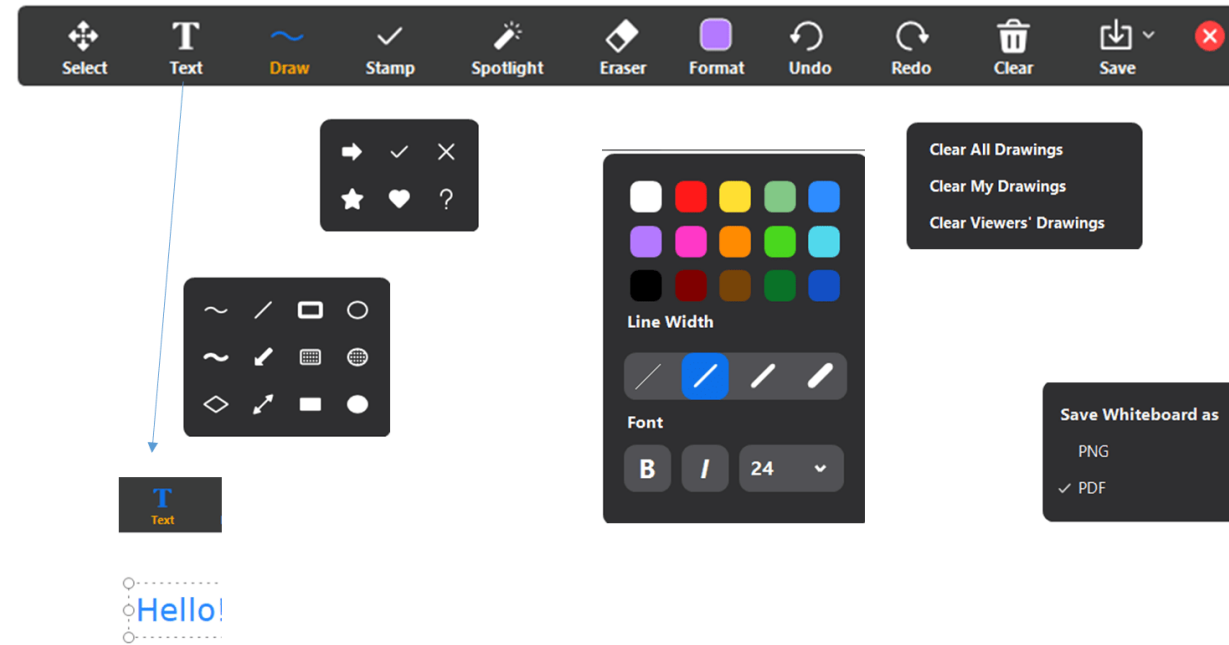
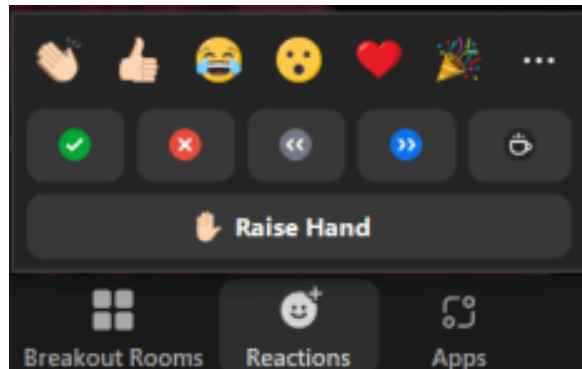
Poll questions will appear on your screen. Select the answer you wish to submit.

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.





Les Clef d'Or





What will I be doing?

How will I learn my job?

Where do I go if I have questions?

How will I know if I am succeeding?

One-on-Ones



- Performance
- Vision and Values
- Expectations
- Motivation

Set for Success!



WORKSTATION



PHONE TRAINING



COMPLIANCE



ANY JOB SPECIFIC SOFTWARE

Training Plans





MAKE A POSITIVE IMPACT

What's Next?

- Sustained Success