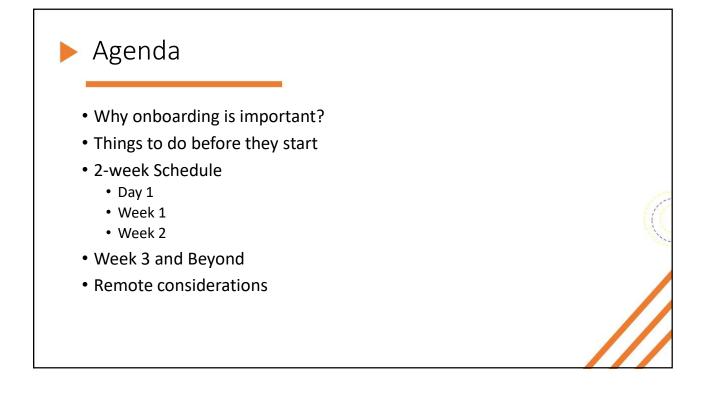
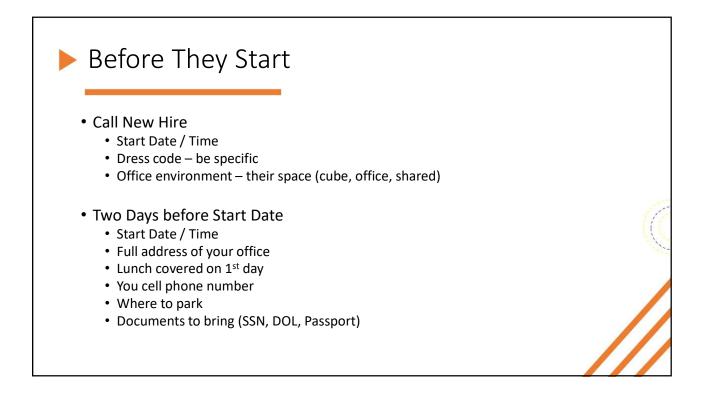
Successfully Onboarding New Employees



Presented by: Krystal Daugherty Date: June 12, 2024 Session: # 33062

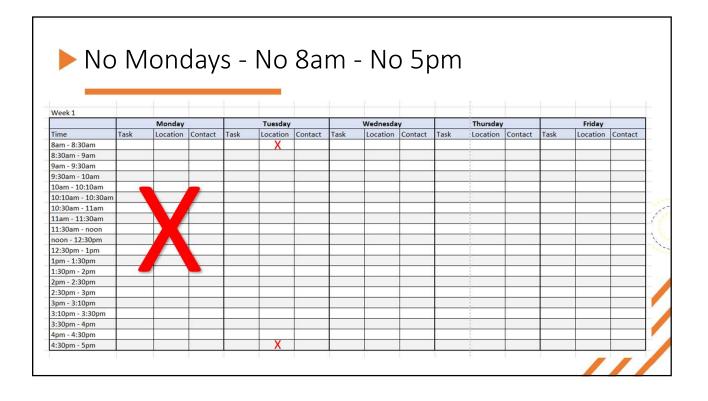






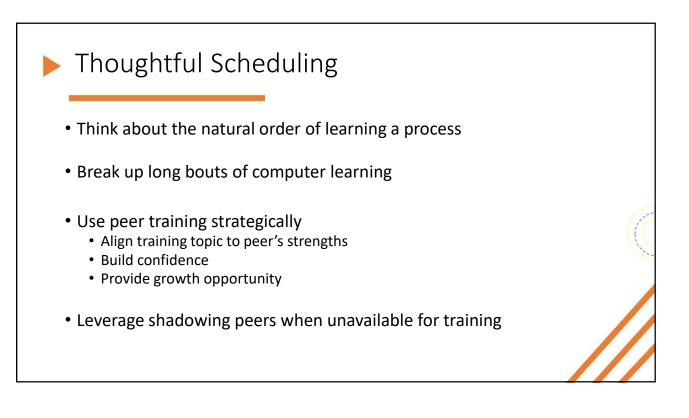


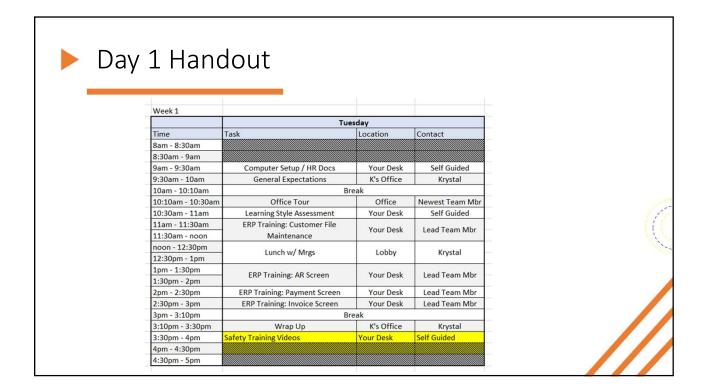
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Week 1															
Monday				Tuesday		Wednesday				Thursday	,		Friday		
Time	Task	Location	Contact	Task	Location	Contact	Task	Location	Contact	Task	Location	Contact	Task	Location	Contact
8am - 8:30am															
8:30am - 9am															
9am - 9:30am															
9:30am - 10am											1				
10am - 10:10am															
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4pm - 4:30pm															
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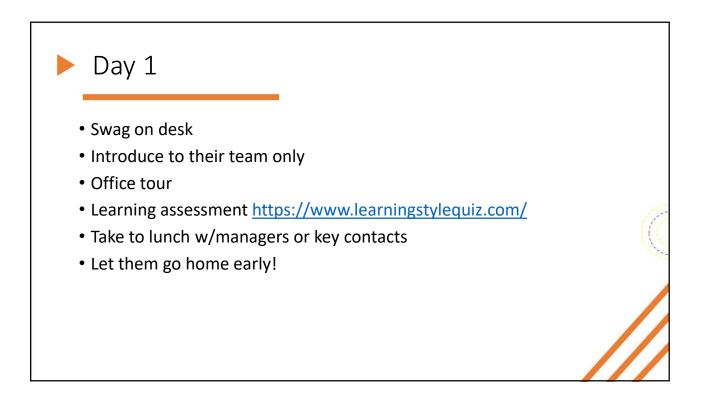


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Time	Task	Location	Contact										
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9am - 9:30am										1			
9:30am - 10am										1			
10am - 10:10am		Break		Break				Break			Break		
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10:30am - 11am													
11am - 11:30am												-	
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1pm - 1:30pm													
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3pm - 3:10pm		Break			Break			Break			Break		
3:10pm - 3:30pm													
3:30pm - 4pm													
4pm - 4:30pm													
4:30pm - 5pm	Wrap Up	K's Office	Krystal										

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Week 1													
	Tuesday			Wednesday			Thursday		Friday				
Time	Task	Location	Contact	Task	Location	Contact	Task	Location	Contact	Task	Location	Contact	
8am - 8:30am													
8:30am - 9am													
9am - 9:30am										Dispute Mtg	Confr Rm	John (Br	
9:30am - 10am										Dispute with	Conn Kin	Mgr)	
10am - 10:10am		Break		Break			Break			Break			
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1pm - 1:30pm													
1:30pm - 2pm													
2pm - 2:30pm													
2:30pm - 3pm													
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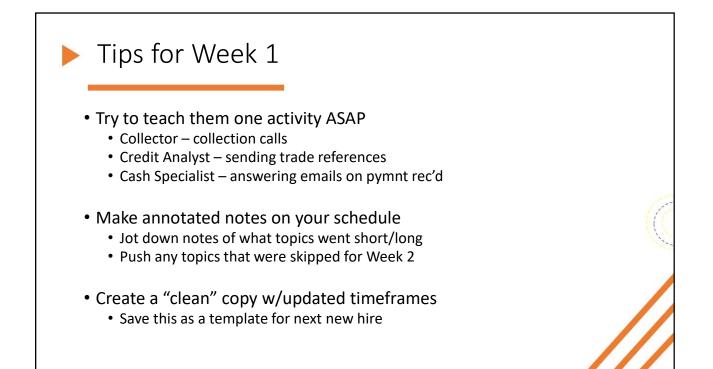




	ay 2 – 4 ⊦								
Week 1	Wedness	lav		Thursday		Friday			
Time	Task	Location	Contact	Task	Task	Contact			
8am - 8:30am	Company Structure	K's Office	Krystal	Review portfolio accts / Knowledge transfer	Location Your Desk	Contact Krystal	ERP Navigation	Location	
8:30am - 9am	Company/Dept Culture	K's Office	Krystal			and the second	Activity	Your Desk	Self Guided
9am - 9:30am	How to print invoice/statement	Your Desk	Team Member	Collection Calls	Your Desk	Shadowed by			
9:30am - 10am	How to take an electronic payment	Your Desk	Team Member			Team Lead	Dispute Meeting	Confer Rm	John (Br Mgr
10am - 10:10am	Break			Break				Break	•
10:10am - 10:30am						Shadowed by			
10:30am - 11am	Shadow Collection Calls	Coworker's	Team Member	Collection Calls	Your Desk		Collection Calls	Your Desk	Self Guided
11am - 11:30am	Shadow Collection Calls	Desk	Team Wember			Krystal	Collection Calls	Your Desk	Self Guided
11:30am - noon				Dept Policy: Terms, Late Fees, CC Fees	Your Desk	Krystal			
noon - 12:30pm	Lunch			Lunch				Lunch	
12:30pm - 1pm	Luici			Editeri				cuncii	
1pm - 1:30pm	ERP Navigation Activity	Your Desk Self Guided		How to search for a payment		Team Member			
1:30pm - 2pm				Office Introductions	Office	Team Member	Collection Calls	Your Desk	Self Guided
2pm - 2:30pm	Review Navigation Activity	K's Office	Krystal				concertor cons	Tour Desit	Sen Guidea
2:30pm - 3pm	Job Specific Expectations	K's Office	Krystal	Outlook / Teams Setup	Your Desk	Team Member			
3pm - 3:10pm	Break			Break	Break				
3:10pm - 3:30pm			Shadowed by	and the second sec		Shadowed by	Collection Calls		
3:30pm - 4pm	Collection Calls	Your Desk	Krystal	Collection Calls	Your Desk	Krystal		Your Desk	
4pm - 4:30pm						10 Marca 10			
4:30pm - 5pm	Wrap Up	K's Office	Krystal	Wrap Up	K's Office	Krystal	Wrap Up	K's Office	Krystal

Day 2 - 4

- Navigation Activity ask for data points found across the different screens you trained on
- Need to have real examples to process
 - Different types of payments (EFT, CC, check), call list, etc
- Email them standard forms
 - Remit instructions, ACH/wire info, credit app, list of helpful websites (SOS, vendor sign-ins, state/industry specific)



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Week 2															
WEEK Z		Monday		-	Tuesday			Wednesday	/	-	Thursday	-		Friday	
Time	Task		Contact	Task		Contact	Task		Contact	Task		Contact	Task		Contact
8am - 8:30am															
8:30am - 9am															
9am - 9:30am	Team Mtg	Confr Rm	Krystal										Dispute		John (Br
9:30am - 10am													Mtg	Confr Rm	Mgr)
10am - 10:10am		Break		Break			Break			Break				Break	
10:10am - 10:30am															
10:30am - 11am	c														
11am - 11:30am															
11:30am - noon															
noon - 12:30pm		Lunch			Lunch			Lunch			Lunch			Team Lunch	
12:30pm - 1pm	Lunch			Lunch			Lunch				Lunch		Team Lunch		
1pm - 1:30pm															
1:30pm - 2pm															
2pm - 2:30pm															
2:30pm - 3pm															
3pm - 3:10pm	Break			Break			Break				Break	21		Break	21
3:10pm - 3:30pm															
3:30pm - 4pm													Wrap Up	K's office	Krystal
4pm - 4:30pm															
4:30pm - 5pm	Wrap Up	K's Office	Krystal	Wrap Up	VIa Office	Krystal	Miran Lin	K's Office	Krystal	Manage Lin	K's Office	Krystal			

