



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 August 10, 2022.

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





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





What's Next?

- Sustained Success