# InCite.

Operations On-Boarding Accelerator™

# OVERVIEW

# Operations On-Boarding Accelerator™

Our business requires that we effectively onboard our operations employees so that they become engaged, quickly focused on productive work, contributing to business goals and become long-term players in our business.

Many firms have done research to try to understand onboarding techniques, unfortunately a standard has not been established that guarantees success. The reality we are dealing with is that the make up of humans is very dynamic and complex.

However, we have found some nuggets of success. Those nuggets are found in certain onboarding strategies (though it is not perfect or complete).

We have taken elements of proven success and driven them into systems to create an opportunity for behavior development, skills development, and results focus.

Our method of onboarding is helping new employees understand our organization and providing a reverse performance model that teaches the participant to take control of their own future by owning their training. They will have mentors and support people along the way.

# Preparing for On-Boarding

## Purpose

It is very important that when an employee shows up on their first day they feel that you are ready for them.  They need to feel as important as they did during the hiring process.

Meeting with the CEO early on is critical!  A great onboarding experience should allow the new employee to experience the company at the heart of everything it does and stands for.  This is VITAL for the engagement.  Sharing your Organization's Clarity is key.

Meeting with other Executive members early on is very important as well.  It is important the employee understands the role(s) of other departments and has an understanding of how each department is connected.

Our goal at the very beginning is to give clarity to expectations of their performance.  Ultimately we want them to own their own performance.

While they may not be able to contribute immediately, they need to understand how their new role is connected to the big picture.

The onboarding process should be designed to get them contributing as soon as possible.  Most people want to be challenged.  We need to find out where they are today and how we can onboard them quickly.

Effective onboarding requires many people to play many roles.  A great plan incorporates the wisdom of the entire company.  The major players will be direct manager, mentor(s) and day to day teammates.  The more we can foster these relationships at the beginning, the greater success we will have.

## Onboarding Checklist

| Item | Completed |
|---|---|
| Welcome Package | ☐ |
| Books and/or articles to read | ☐ |
| Agency Playbook | ☐ |
| Brand Compass (Vision, Culture, Client Experience, Brand) | ☐ |
| Strategic & Tactical Plan Review | ☐ |
| Flowers, gift or company swag for desk | ☐ |
| Communication to employees | ☐ |
| Initiate computer support | ☐ |
| Set-up workspace | ☐ |
| Enroll for payroll | ☐ |
| Schedule onboarding meetings (CEO, Executives, Producers, Service) | ☐ |
| Assign mentor(s) | ☐ |
| Schedule welcome lunches | ☐ |
| Complete itinerary for first week | ☐ |
| | ☐ |
| | ☐ |
| | ☐ |

# Organizational Clarity

# Organizational Clarity – Brand Compass

**INCITE** Performance Group

## BRAND COMPASS

### PURPOSE

**To be the best agency growth machine in North America.**

InCite will consistently be recognized as the leading advisor to agents and brokers that improves their life and helps them realize their dreams today and

*the dreams they have yet to dream.*

### MISSION

**To increase the value of our member-clients by growing their business and helping them become more profitable.**

Our competition will bring cookie cutter solutions. We help you turn insight into InCite.

### BELIEFS

Abundance thinking
Obtain – Retain – or Nothing
Love your team
Continuous Learning
Innovative
Nimble implementation
Permission Not Required!
Leave a mark!
Athletes Mentality
**We do what we teach...**

### GUIDING PRINCIPLE:

**INCITE will transform the industry as we know it**
by turning knowledge into action.


### THE BRAND ESSENCE

Long Form

**INCITE** is the **only** insurance agency advisor
that delivers leading edge resources + advisory expertise
to the most progressive growth oriented insurance agencies
all across the US and Canada
who want to differentiate themselves from the market clutter
and leapfrog their competition
in an era of me-too insurance insurance services and products.

Short Form

**INCITE** is the **only** insurance agency advisor that delivers a true agency transformation experience.

### THE DEFINING INCITE

**WHAT** we do:

We study the industry
We know what it takes to grow
We analyze the client situation
We guide our member-clients

**HOW** we do it:

We bridge the gap between knowledge [insight] and action [InCite].

**WHY** we do it:

We believe the independent insurance agency system is the greatest industry on the planet. We have a deep passion for helping our member-clients grow and perpetuate a flourishing business for generations to come.


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**INCITE** Performance Group

## BRAND COMPASS

### BRAND ALIGNMENT

#### IDEAL CLIENT PROFILE

- Independent agency/broker owners
- Committed to Independence
- Learners
- Willing to innovate
- Multiple lines of business
- Abundance Thinkers
- Invest in getting better

#### EMPLOYEE PROFILE

- Abundance Thinkers
- Cultural fit to work in "Netflix" environment
- Think like owners
- Selfless
- Spiritual
- Learners
- Athletes Mentality

#### GROWTH ENGINE

**TRAINING**
High level programs that speed up the development and results members want. Training for sales, leadership, operations and insurance.

**NETWORKING**
Sharing, growing, and supporting each other with ideas, writing business for each other and become a brand in themselves.

**RESOURCE**
We will deliver cutting edge insurance products, consulting services, intellectual property and tools to utilize resell to grow your business.

**ADVISORY**
Individual talent in a collaborative environment. We are adding high-end advisors to the team. Our team is diverse armed with industry expertise.

#### MEMBER-CLIENT EXPERIENCE

**Goldilocks** - just right to focus on teaching and advising
**Sherpa** - guide them from where they are to where they're going
**Four seasons** - support walk them to desired outcomes
**Einstein** - Innovative, Smart and Prepared
**InCite** - Change the way they think. Inspire action

#### TEAM EXPERIENCE

**"I want to work with people who..."**

- I can trust
- Value my ideas
- Challenge me
- Inspire me
- Care about me

#### ON-BRAND CHARACTERISTICS

Disruptive
Leading Edge – keywords – Inspire
Momentum


**we are:**

- Disruptive
- Knowledge
- Experienced
- Guides
- Innovative
- Resources for execution
- InCite

#### EXTENAL MANTRA

Inciting transformation for the sake of **growth**.

#### INTERNAL MANTRA

An **abundant** mindset multiplies results.

INCITE

# Performance Management

## Performance Management

Depending on the department, the purpose of the role of an Account Manager is to Retain our Agency's ideal clients or help Producers and/or Account Executive's with the Retaining of our Agency's ideal clients. Account Managers must also challenge clients to think differently about the way they manage risk, and to give clients a reason WHY they should do business with our organization.

## Top 5 Results of Account Managers

1. Average Revenue per service staff:
    - Commercial – $470,000
    - Benefits – $400,000
    - Personal – $320,000
2. Sustain a retention rate of 93 to 95% of revenue
3. Be a challenger in the methods of advising and cross-selling: teach, tailor, take control
4. Quantify the client experience
5. Develop each client to have all their business with the Agency

## Performance Management

The purpose of the role of an Account Administrator is to help support Producers, Account Executives & Account Managers with the Retaining of our Agency's ideal client.  We do this through delivering a great product at a very high-level of productivity and efficiency.

## Top 5 Results of Account Admin.

1. Average Revenue per service staff:
   - Commercial – $470,000
   - Benefits – $400,000
   - Personal – $320,000

2. Maintain a high level of quality control with the work produced

3. Quantify the client experience

4. Manage backlog and a very high-level

5. Support team on maintaining a retention level of 93 to 95% of revenue

# Performance Objectives – Account Manager

## InCite Growth Report (IGR)

NOTE: If you don't complete your Growth Report for your team leader meeting, you will get a zero score for that given month

*Team Member:*

*2016*

| *Objectives* | % | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Client Experience Standards & Examples | 30% | | | | | | | | | | | | |

Objective: Embody the InCite Client Experience standards in your written and verbal communication, phone etiquette, and in-person presentation.
- Goldilocks: Just right to focus on teaching and advising
- Sherpa: Guide them from where they are to where they're going
- Four Season: Support and walk them to desired outcomes
- Einstein: Innovative, Smart and Prepared
- InCite: Change the way they think. Inspire action

Other InCite Client Experience standards
- Being accountable
- Surprising and Delighting
- Using proper grammar in written communications
- Addressing clients by name on phone and email
- Replying to emails and returning phone calls by end of day
- Positive affirmation email responses by end of business day

Received with Date and Time Range of resolution

| | |
|---|---|
| 5 | Show evidence of 7 examples |
| 4 | Show evidence of 6 examples |
| 3 | Show evidence of 5 examples |
| 2 | Show evidence of 4 examples |
| 1 | Show evidence of 3 example |

| *Objectives* | % | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Event Coordination | 20% | | | | | | | | | | | | |

Objective: Meet the following benchmarks:
- Marketing plan is executed 100%
- Budget is established with Director of Ops and even is at or under budget
- Materials are correct and in-hand on time
- Digital presentations are correct and in-hand on time
- No grammatical errors or typos on materials
- Seamless coordination with hotel, Advisors and attendees and strategic partners

| | |
|---|---|
| 5 | Meet level 4 criteria, P&L is under budget, positive client/advisor feedback and no errors on materials |
| 4 | Meet level 3 criteria and event P&L is on budget, positive client/advisor feedback and no more than one error |
| 3 | Show evidence of 3 benchmarks and positive client/advisor feedback |
| 2 | Show evidence of 2 benchmarks |
| 1 | Show evidence of 1 benchmark |

# Performance Objectives – Account Administrator

## Client Scheduling

20%

Objective: Ensure client scheduling is accurate and you provide thorough communication to all parties. Keep on top of Bonita's and Brandon's schedule and have all Plan promises and meetings scheduled through the year. Provide monthly evidence of schedule and that you have no more than 5 examples of mistakes/errors.

| | |
|---|---|
| 5 | No clients missed in a single month (starting June) for more than 6 months |
| 4 | No clients missed in a single month (starting June) for more than 3 months |
| 3 | No more than 2 clients missed in a single month (starting June) due to our follow up |
| 2 | No more than 4 clients missed in a single month |
| 1 | No more than 6 clients missed in a single month |

## Personal Development (Business Acumen)

15%

Objective: Meet the following initiatives:
- Complete your Personal Development Plan and review with Director of Ops for approval by June 1st
- Quarterly elective - Examples include the following:
  - Attend an Advisor workshop
  - Watch or attend an InCite video or webinar
  - Take a course on Lynda.com (see Guidelines tab for login credentials)
  - Spend 30 minutes reviewing materials on Zywave (see Guidelines tab for login credentials)
- Expand your business acumen knowledge by reading an article or attending a class that pertains to another discipline - excluding personal blogs
- Become an expert on a topic
- Learn information and share it with fellow Team Members or clients (ex. proactive thinking, articles,...)

| | |
|---|---|
| 5 | Level 4 plus 1 learning that you shared/trained others at InCite that helped them gain efficiency or enhance the Client Experience |
| 4 | Level 3 plus 1 learning that you applied in your role |
| 3 | Evidence that Personal Development Plan is being followed |
| 2 | Evidence that Personal Development Plan is completed but not on schedule |
| 1 | Evidence that Personal Development Plan is completed |

## Project Management Coordination/Operations Workflows

15%

Objective: Show evidence of monthly accomplishment on agreed upon actions steps in the project.
- Complete and deliver the agreed upon Operations/Client Experience workflows assigned to you by the indicated due date

| | |
|---|---|
| 5 | Level 4 completed plus positive Client, Advisor or RM feedback due to workflow/experience |
| 4 | Level 3 plus 1 workflow training to team by you |
| 3 | All Action Steps completed for the month and 1 workflow finalized and documented |
| 2 | All Action Steps completed for the month |
| 1 | 50% of Action Steps completed for the month |

# Assessments

## Technical Knowledge (Personal)

| Item | No Knowledge | Basic Knowledge | Intermediate Knowledge | Mastery Knowledge | Training Required (Y/N) | Notes |
|---|---|---|---|---|---|---|
| Property | ☐ | ☐ | ☐ | ☐ | | |
| Automobile | ☐ | ☐ | ☐ | ☐ | | |
| Umbrella | ☐ | ☐ | ☐ | ☐ | | |
| Automobile Endorsements | ☐ | ☐ | ☐ | ☐ | | |
| Personal Effects | ☐ | ☐ | ☐ | ☐ | | |
| Collectibles | ☐ | ☐ | ☐ | ☐ | | |
| Recreational Vehicles | ☐ | ☐ | ☐ | ☐ | | |
| Trailers | ☐ | ☐ | ☐ | ☐ | | |
| Antique Vehicles | ☐ | ☐ | ☐ | ☐ | | |
| Builder’s Risk | ☐ | ☐ | ☐ | ☐ | | |
| Personal Farms | ☐ | ☐ | ☐ | ☐ | | |
| Marine | ☐ | ☐ | ☐ | ☐ | | |
| Aviation | ☐ | ☐ | ☐ | ☐ | | |
| Cyber Liability | ☐ | ☐ | ☐ | ☐ | | |
| Licensing | ☐ | ☐ | ☐ | ☐ | | |
| Accreditations | ☐ | ☐ | ☐ | ☐ | | |

## Technical Knowledge (Commercial)

| Item | No Knowledge | Basic Knowledge | Intermediate Knowledge | Mastery Knowledge | Training Required (Y/N) | Notes |
|---|---|---|---|---|---|---|
| Property | ☐ | ☐ | ☐ | ☐ | | |
| Commercial Fleet | ☐ | ☐ | ☐ | ☐ | | |
| Standard Garage | ☐ | ☐ | ☐ | ☐ | | |
| Directors & Officers | ☐ | ☐ | ☐ | ☐ | | |
| Errors & Omissions | ☐ | ☐ | ☐ | ☐ | | |
| Commercial General Liability | ☐ | ☐ | ☐ | ☐ | | |
| Commercial Umbrella | ☐ | ☐ | ☐ | ☐ | | |
| Bonding | ☐ | ☐ | ☐ | ☐ | | |
| Certificates | ☐ | ☐ | ☐ | ☐ | | |
| Builder’s Risk | ☐ | ☐ | ☐ | ☐ | | |
| Equipment Breakdown | ☐ | ☐ | ☐ | ☐ | | |
| Aviation | ☐ | ☐ | ☐ | ☐ | | |
| Marine | ☐ | ☐ | ☐ | ☐ | | |
| Legal Expense Liability | ☐ | ☐ | ☐ | ☐ | | |
| Cyber Liability | ☐ | ☐ | ☐ | ☐ | | |
| Licensing | ☐ | ☐ | ☐ | ☐ | | |
| Accreditations | ☐ | ☐ | ☐ | ☐ | | |

## Technical Knowledge (Benefits)

| Item | No Knowledge | Basic Knowledge | Intermediate Knowledge | Mastery Knowledge | Training Required (Y/N) | Notes |
|---|---|---|---|---|---|---|
| Carrier programs | ☐ | ☐ | ☐ | ☐ | | |
| HMO/PPO/POS | ☐ | ☐ | ☐ | ☐ | | |
| HR & Benefits Compliance | ☐ | ☐ | ☐ | ☐ | | |
| ACA Compliance for US | ☐ | ☐ | ☐ | ☐ | | |
| HSA/HRA/FSA | ☐ | ☐ | ☐ | ☐ | | |
| Self Funded Plans | ☐ | ☐ | ☐ | ☐ | | |
| Actuarial Skills | ☐ | ☐ | ☐ | ☐ | | |
| Plan Modeling | ☐ | ☐ | ☐ | ☐ | | |
| Captive Insurance | ☐ | ☐ | ☐ | ☐ | | |
| Claims Navigation | ☐ | ☐ | ☐ | ☐ | | |
| Claims Resolution | ☐ | ☐ | ☐ | ☐ | | |
| Doctor networks | ☐ | ☐ | ☐ | ☐ | | |
| Contribution Structures | ☐ | ☐ | ☐ | ☐ | | |
| Administration (adds/deletes) | ☐ | ☐ | ☐ | ☐ | | |
| Enrollment/Ben Admin Technology | ☐ | ☐ | ☐ | ☐ | | |
| Licensing | ☐ | ☐ | ☐ | ☐ | | |
| Accreditations | ☐ | ☐ | ☐ | ☐ | | |

## Service Skills Knowledge

| Item | No Knowledge | Basic Knowledge | Intermediate Knowledge | Mastery Knowledge | Training Required (Y/N) | Notes |
|---|---|---|---|---|---|---|
| Client Experience | ☐ | ☐ | ☐ | ☐ | | |
| Cross Selling within line of business | ☐ | ☐ | ☐ | ☐ | | |
| Cross Selling outside line of business | ☐ | ☐ | ☐ | ☐ | | |
| Exit Barrier Strategies | ☐ | ☐ | ☐ | ☐ | | |
| Enhanced Coverage Conversations | ☐ | ☐ | ☐ | ☐ | | |
| Asking for Referrals | ☐ | ☐ | ☐ | ☐ | | |
| Presentation Skills | ☐ | ☐ | ☐ | ☐ | | |
| Proactive vs. Reactive | ☐ | ☐ | ☐ | ☐ | | |
| Communication Skills | ☐ | ☐ | ☐ | ☐ | | |
| Problem Solving | ☐ | ☐ | ☐ | ☐ | | |
| Difficult Client Conversations | ☐ | ☐ | ☐ | ☐ | | |
| Time Maximization Techniques | ☐ | ☐ | ☐ | ☐ | | |
| Professionalism | ☐ | ☐ | ☐ | ☐ | | |
| Personal Brand | ☐ | ☐ | ☐ | ☐ | | |

## Technology/Systems Knowledge

| Item | No Knowledge | Basic Knowledge | Intermediate Knowledge | Mastery Knowledge | Training Required (Y/N) | Notes |
|---|---|---|---|---|---|---|
| Agency Management System | ☐ | ☐ | ☐ | ☐ | | |
| Building Evaluator System | ☐ | ☐ | ☐ | ☐ | | |
| Microsoft Word | ☐ | ☐ | ☐ | ☐ | | |
| Microsoft Excel | ☐ | ☐ | ☐ | ☐ | | |
| Microsoft Power Point | ☐ | ☐ | ☐ | ☐ | | |
| Outlook | ☐ | ☐ | ☐ | ☐ | | |
| Prospecting System (e.g. PipeDrive) | ☐ | ☐ | ☐ | ☐ | | |
| Desktop Faxing System (e.g. fax advantage) | ☐ | ☐ | ☐ | ☐ | | |
| Insurance Company Websites | ☐ | ☐ | ☐ | ☐ | | |
| Insurance Company Portals | ☐ | ☐ | ☐ | ☐ | | |
| Online Management (e.g. CSR 24) | ☐ | ☐ | ☐ | ☐ | | |
| Skype | ☐ | ☐ | ☐ | ☐ | | |
| Yammer | ☐ | ☐ | ☐ | ☐ | | |
| InCite Website | ☐ | ☐ | ☐ | ☐ | | |
| Facebook | ☐ | ☐ | ☐ | ☐ | | |
| Linkedin | ☐ | ☐ | ☐ | ☐ | | |
| Twitters | ☐ | ☐ | ☐ | ☐ | | |

## Business Acumen

| Item | No Knowledge | Basic Knowledge | Intermediate Knowledge | Mastery Knowledge | Training Required (Y/N) | Notes |
|---|---|---|---|---|---|---|
| Emerging Risks | ☐ | ☐ | ☐ | ☐ | | |
| Balance Sheet | ☐ | ☐ | ☐ | ☐ | | |
| Regional Economics | ☐ | ☐ | ☐ | ☐ | | |
| National Economics | ☐ | ☐ | ☐ | ☐ | | |
| World Economics | ☐ | ☐ | ☐ | ☐ | | |
| WikiRisk | ☐ | ☐ | ☐ | ☐ | | |
| Daily Relevant Periodicals | ☐ | ☐ | ☐ | ☐ | | |
| Business Finance | ☐ | ☐ | ☐ | ☐ | | |
| Estate Planning Details (trusts, will, tax) | ☐ | ☐ | ☐ | ☐ | | |
| Tax | ☐ | ☐ | ☐ | ☐ | | |
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# 30 Day Onboarding Plan

# 30 Day Onboarding Plan

## 30 Day Onboarding Plan

| Training Required | Trainer | Mentor Check-Ins | Manager Check-Ins | Booked on Calendar |
|---|---|---|---|---|
| Technical | ☐ | ☐ | ☐ | ☐ |
| 1. | ☐ | ☐ | ☐ | ☐ |
| 2. | ☐ | ☐ | ☐ | ☐ |
| 3. | ☐ | ☐ | ☐ | ☐ |
| Service Skills | ☐ | ☐ | ☐ | ☐ |
| 1. | ☐ | ☐ | ☐ | ☐ |
| 2. | ☐ | ☐ | ☐ | ☐ |
| 3. | ☐ | ☐ | ☐ | ☐ |
| Technology/Systems | ☐ | ☐ | ☐ | ☐ |
| 1. | ☐ | ☐ | ☐ | ☐ |
| 2. | ☐ | ☐ | ☐ | ☐ |
| 3. | ☐ | ☐ | ☐ | ☐ |
| Acumen | ☐ | ☐ | ☐ | ☐ |
| 1. | ☐ | ☐ | ☐ | ☐ |
| 2. | ☐ | ☐ | ☐ | ☐ |
| 3. | ☐ | ☐ | ☐ | ☐ |

| **Measure & Monitor** | **Week 1** | **Week 2** | **Week 3** | **Week 4** |
|---|---|---|---|---|
| Discuss how the training benefits the new role | | | | |
| What information did you learn? | | | | |
| What information did you not understand? | | | | |
| What more do you need to know about the topic? | | | | |

# 30 Day Calendar

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|---|---|---|---|---|---|---|
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# 60 Day Onboarding Plan

# 60 Day Onboarding Plan

| Training Required | Trainer | Mentor Check-Ins | Manager Check-Ins | Booked on Calendar |
|---|---|---|---|---|
| Technical | ☐ | ☐ | ☐ | ☐ |
| 1. | ☐ | ☐ | ☐ | ☐ |
| 2. | ☐ | ☐ | ☐ | ☐ |
| 3. | ☐ | ☐ | ☐ | ☐ |
| Service Skills | ☐ | ☐ | ☐ | ☐ |
| 1. | ☐ | ☐ | ☐ | ☐ |
| 2. | ☐ | ☐ | ☐ | ☐ |
| 3. | ☐ | ☐ | ☐ | ☐ |
| Technology/Systems | ☐ | ☐ | ☐ | ☐ |
| 1. | ☐ | ☐ | ☐ | ☐ |
| 2. | ☐ | ☐ | ☐ | ☐ |
| 3. | ☐ | ☐ | ☐ | ☐ |
| Acumen | ☐ | ☐ | ☐ | ☐ |
| 1. | ☐ | ☐ | ☐ | ☐ |
| 2. | ☐ | ☐ | ☐ | ☐ |
| 3. | ☐ | ☐ | ☐ | ☐ |

| **Measure & Monitor** | **Week 1** | **Week 2** | **Week 3** | **Week 4** |
|---|---|---|---|---|
| Discuss how the training benefits the new role | | | | |
| What information di you learn? | | | | |
| What information did you not understand? | | | | |
| What more do you need to know about the topic? | | | | |

# 60 Day Calendar

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|---|---|---|---|---|---|---|
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# 90 Day Onboarding Plan

# 90 Day Onboarding Plan

| Training Required | Trainer | Mentor Check-Ins | Manager Check-Ins | Booked on Calendar |
|---|---|---|---|---|
| Technical | ☐ | ☐ | ☐ | ☐ |
| 1. | ☐ | ☐ | ☐ | ☐ |
| 2. | ☐ | ☐ | ☐ | ☐ |
| 3. | ☐ | ☐ | ☐ | ☐ |
| Service Skills | ☐ | ☐ | ☐ | ☐ |
| 1. | ☐ | ☐ | ☐ | ☐ |
| 2. | ☐ | ☐ | ☐ | ☐ |
| 3. | ☐ | ☐ | ☐ | ☐ |
| Technology/Systems | ☐ | ☐ | ☐ | ☐ |
| 1. | ☐ | ☐ | ☐ | ☐ |
| 2. | ☐ | ☐ | ☐ | ☐ |
| 3. | ☐ | ☐ | ☐ | ☐ |
| Acumen | ☐ | ☐ | ☐ | ☐ |
| 1. | ☐ | ☐ | ☐ | ☐ |
| 2. | ☐ | ☐ | ☐ | ☐ |
| 3. | ☐ | ☐ | ☐ | ☐ |

| **Measure & Monitor** | **Week 1** | **Week 2** | **Week 3** | **Week 4** |
|---|---|---|---|---|
| Discuss how the training benefits the new role | | | | |
| What information di you learn? | | | | |
| What information did you not understand? | | | | |
| What more do you need to know about the topic? | | | | |

# 90 Day Calendar

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|---|---|---|---|---|---|---|
| | | | | | | |
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# 120 Day Onboarding Plan

## 120 Day Onboarding Plan

| Training Required | Trainer | Mentor Check-Ins | Manager Check-Ins | Booked on Calendar |
|---|---|---|---|---|
| Technical | ☐ | ☐ | ☐ | ☐ |
| 1. | ☐ | ☐ | ☐ | ☐ |
| 2. | ☐ | ☐ | ☐ | ☐ |
| 3. | ☐ | ☐ | ☐ | ☐ |
| Service Skills | ☐ | ☐ | ☐ | ☐ |
| 1. | ☐ | ☐ | ☐ | ☐ |
| 2. | ☐ | ☐ | ☐ | ☐ |
| 3. | ☐ | ☐ | ☐ | ☐ |
| Technology | ☐ | ☐ | ☐ | ☐ |
| 1. | ☐ | ☐ | ☐ | ☐ |
| 2. | ☐ | ☐ | ☐ | ☐ |
| 3. | ☐ | ☐ | ☐ | ☐ |
| Acumen | ☐ | ☐ | ☐ | ☐ |
| 1. | ☐ | ☐ | ☐ | ☐ |
| 2. | ☐ | ☐ | ☐ | ☐ |
| 3. | ☐ | ☐ | ☐ | ☐ |

| **Measure & Monitor** | **Week 1** | **Week 2** | **Week 3** | **Week 4** |
|---|---|---|---|---|
| Discuss how the training benefits the new role | | | | |
| What information di you learn? | | | | |
| What information did you not understand? | | | | |
| What more do you need to know about the topic? | | | | |

# 120 Day Calendar

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|---|---|---|---|---|---|---|
| | | | | | | |
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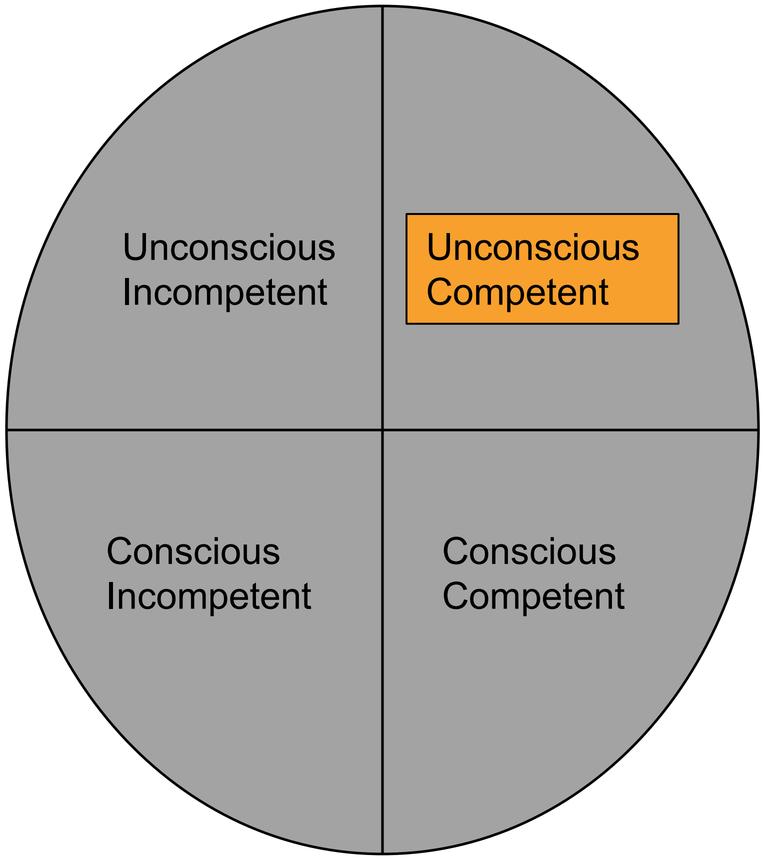
| | | | | | | |
| | | | | | | |
| | | | | | | |

## Continuous Development

Our goal as employees is to constantly be learning and developing our skills.  It is important to always come back to the assessments on a regular basis and determine where you are and what you need to do each 30 days.

Using the Learning Cycle, we want to get to a place of Unconscious Competent or Mastery with the skills required to do the job today and for the future.

Develop a Plan that includes your manager and mentor(s).



# Onboarding Resources

## InCite Onboarding Tools – www.incitepg.com

Operations On-Boarding Accelerator™

Operations Development Training Worksheets

Operations Videos

Time Maximization Tool

Account Manager Branding Guide

Consequence Worksheet

## Books

Brand Damage: It's Personal – Larry G. Linne & Patrick Sitkins

Make the Noise Go Away – Larry G. Linne

The Challenger Sale – Matthew Dixon & Brent Adamson

Unleashing Excellence – Dennis Snow & Teri Yanovitch