

DESIGN STEP	PLAN	NOTES
ANALYZE	<p>Needs assessment:</p> <ul style="list-style-type: none"> * Company desires new employees to have concrete understanding of mission, vision, values * Surveys of new employees show need for info regarding benefits, resources, and office setup. 	<ul style="list-style-type: none"> * Talk to benefits department to see about slides they've already prepared.
DESIGN	<p>Who will take this course? All new employees during their first week of employment.</p> <p>Objective 1: By the end of this course, new employees will be able to communicate the company's vision, mission, and core values and be able to communicate how their role fits in.</p> <p>Objective 2: When this course is completed, all new employees will complete their benefits form and know who to contact if they have further questions about their benefits.</p> <p>Objective 3: On their first day in the office, all new employees will have the tools necessary to set up their work space.</p> <p>How will they learn?</p> <p>REMOTE WORKERS - E-learning seminar - Created with 360 Rise - Text / Video / Links to resources / Quizzes</p> <p>HYBRID WORKERS - Combo of independent e-learning + 1/2 day in-person training (discussion-based groups and activities with me facilitating)</p>	<ul style="list-style-type: none"> * Contact tech department regarding usernames and current acceptable use policy
DEVELOP	<ul style="list-style-type: none"> * LINK TO STORYBOARD* 	
IMPLEMENT	<ul style="list-style-type: none"> * Upload e-learning lesson to LMS * Training date for hybrid scheduled for 4/27 from 9 am to noon with lunch with CEO afterwards. 	<ul style="list-style-type: none"> * Arrange catering * Conference room C already scheduled for this date. * Confirm on 4/20 that CEO is available. * IT is setting up projector and screen. * Arrive at 8:00 to set up.
EVALUATE	<ul style="list-style-type: none"> * Attendance/completion of learning modules. * Formative evaluations (quiz) after every section of e-learning * Summative Evaluation: look-fors = understanding of MVV, basic benefit plans, and ability to access FAQs about first day on insiders page on company website. * Survey before first day regarding remaining questions, things still don't understand. 	<ul style="list-style-type: none"> * Create survey to email the day after training (4/28) * Follow up with benefits department

Storyboard

Lesson One	Objective
Introductions and Company Info	Students will demonstrate an understanding of the mission, vision, and values of the company.

Title / Slide	Visual Instructions / notes	Slide Text	Facilitator Notes
Title Screen - Slide 1	Touchpoint Logo and slogan Note — include Touchpoint Color scheme throughout	Heading: “TouchPoint Financial” Adding a touch of compassion to your finances	* Welcome and congratulate everyone. * Introduce yourself
Welcome Slide - Slide 2	Welcome graphic	Heading: New Employee Orientation * Introductions * History of TouchPoint * Mission Vision Values * Your First Day * Choosing your Benefits	* Take a couple of minutes to share what the day will be like (mix of lecture, media, and discussion/activities). * Share timing (9 -12 with 2 breaks) as well as restroom and snack info.
Welcome Slide - Slide 3	* Picture of James Briggins + audio welcome from him	Welcome to Our Team James Briggins, CEO	* Introduce slide before playing audio. * Tell group that Mr. Briggins will be joining us for lunch.
Introductions - Slide 4		Heading - Share with Your Group Text boxes with “Your name” “Your Role”, “Fun Fact”	* Talk about importance of relationships and connecting in the workplace...synergy. * “We’re going to take some time to get to know just a bit about the people at our tables...each person will share your name, your new role, and a fun fact about yourself. I’ll give you a minute to prepare, then we’ll start. You have about 7 minutes. Hopefully that will give you some time to chat after each sharing those 3 things.

Title / Slide	Visual Instructions / notes	Slide Text	Facilitator Notes
History of TouchPoint - Slide 5	Video - "History of TouchPoint" (TouchPoint History.mp4) – 6 minutes	Heading - "History of TouchPoint"	Introduce video...then click to begin video
Mission - Slide 6	Add icon to represent mission	Heading - "Our Mission" Body - "To help people achieve financial security through investments that match their values".	Before mission statement comes on screen, talk about how a mission statement lets you know what your marching orders are. Then click to bring up TouchPoint's mission - to help people achieve financial security through investments that match their values".
Vision - Slide 7	Add icon to represent vision	Heading - "Our Vision" Body - "At TouchPoint, we provide financial services that enable people to achieve their financial goals in a way that aligns with their values. Our teams seek to touch people's lives by figuring out the point where there goals, their values, and their finances meet. We hire a diverse team because we serve a diverse population. "	Define vision – the basic meaning and purpose of Touchpoint – who we are to our clients and employees. * Read Vision out loud Know this, the trainees will have time to work with this later... don't spend too much time here.
Values - Slide 8	Add icon to represent values	Heading: "Our Values" = plus graphics with "diversity", "generosity", "sustainability", "compassion", "financial clarity"	<Script 1> about values. Discuss how everyone has unique values, and those values tell a lot about that person. In same way, the values of a company can tell you a great deal about the company. List the values and point to screen. Ask, "When you see these values, what comes to mind about TouchPoint Financial?" Take 2-3 answers.

Title / Slide	Visual Instructions / notes	Slide Text	Facilitator Notes
Reflect - Slide 9	2 halves - individual reflection and group reflection	<p>Individual questions:</p> <ul style="list-style-type: none"> * How do the values of the company apply to my role? * In what tangible ways can I support the mission of TouchPoint? * Rewrite the TouchPoint mission statement so it goes with your role, so that it becomes your mission statement. <p>Group Questions:</p> <ul style="list-style-type: none"> * Without looking, see if your group can recall the 5 values of TouchPoint. * Share your individual reflections about how the values of TouchPoint apply to your roles. * Share your individual Mission statements. 	<ul style="list-style-type: none"> * Hand out reflection sheets (include mission/vision/values on back). * Introduce slide and questions * Give them about 10 minutes to work individually on individual questions. * Give another 10 - 15 minutes to discuss at tables.
Break Time - Slide 10	Youtube 15 minute timer	Break Time!	Introduce break time — add exactly 15 minutes to when you plan on releasing them and give them that time (even if it's a strange number like 10:02). Play upbeat music during break. Make the rounds and talk to people who come back early.