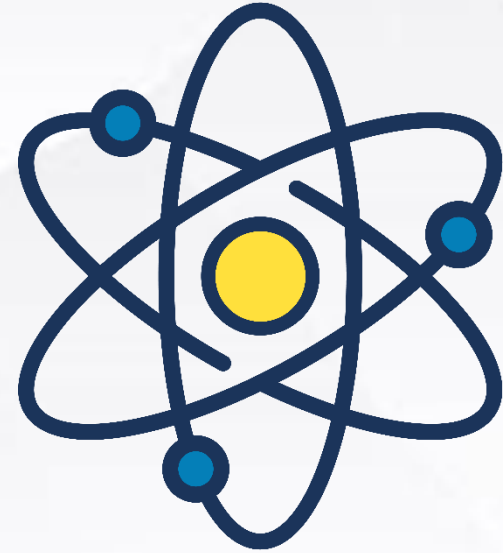


# Evolve



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Onboarding and Continued Learning Program

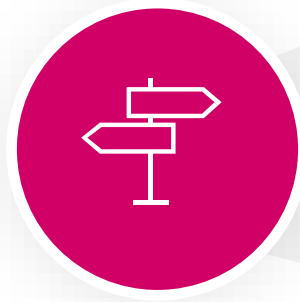
# 01 EMBARK

The new hire experience



# 03 EXPLORE

Continued education to build your base skills



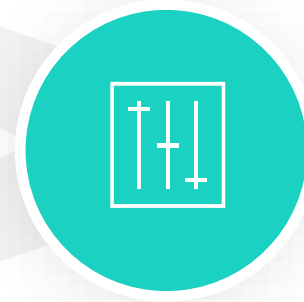
# 05 EXCEL

A pathway to support movement through the company



# 02 ENGAGE

Core training to prepare you for your position



# 04 ENHANCE

Continued education to fine-tune skills to develop expertise



# ENRICH

Social and Emotional skill, work skill development

The new hire experience

**HR Requirements**

**Welcome to the Company**

**Tools and Resources**

**Our Clients**

**Our Products**

**Introduction to main products**

**ALL DEPARTMENTS**

**ACCOUNTING**

**CLIENT SERVICES**

**DEVELOPMENT**

**IMPLEMENTATION**

**IT**

**LEARNING & DEVELOPMENT**

**MARKETING & COMMUNICATIONS**

**PRODUCT**

**SALES & ACCOUNT MANAGEMENT**

**TEAM RESOURCES**

# ENGAGE



2

Core training to prepare you for your position

## Core Training

### Software

### Client Relationships & Communication

### Types of Learning

- Reading/Writing
- Videos
- One-on-One
- Practices
- Role-Play/Trainbacks

e.g.

### **IMPLEMENTATION**

**Core product functions and  
standard features**

**Conducting an  
implementation**

**Product demos**

**Pricing Structure**

**Contracts**

**Branding and Templates**

**Software and Tools**

# EXPLORE



3

Continued education to build your base skills

## Areas beyond the core

### Types of Learning

- Reading/Writing
- Videos
- One-on-One
- Practices
- Problem Solving
- Role-Play/Trainbacks

e.g.

### **IMPLEMENTATION**

**More complex functions  
and features**

**Industry trends  
Legislative impacts**

# ENHANCE



4

Continued education to fine-tune skills to develop expertise

## Product Expertise

## Content Contribution

## Types of Learning

- Reading/Writing
- Videos
- One-on-One
- Practices
- Problem Solving
- Role-Play/Trainbacks

**Tax Structures**  
**Legislative Adaptations**  
**Union Adaptations**  
**Insurance**  
**Module Expert**

# EXCEL

5

A pathway to support movement through the company

## Cross-Department Training

## Leadership Training

### Types of Learning

- Reading/Writing
- One-on-One
- Problem Solving
- Job Shadowing
- Professional Development

### **ALL DEPARTMENTS**

**ACCOUNTING**

**CLIENT SERVICES**

**DEVELOPMENT**

**IMPLEMENTATION**

**IT**

**LEARNING & DEVELOPMENT**

**MARKETING & COMMUNICATIONS**

**PRODUCT**

**SALES & ACCOUNT MANAGEMENT**

**TEAM RESOURCES**

# ENRICH

Social and emotional skill development:

SELF-AWARENESS, SELF-MANAGEMENT, SOCIAL AWARENESS,  
RESPONSIBLE DECISION-MAKING, RELATIONSHIP SKILLS

**Professional development opportunities**

**Volunteering/Community Engagement**

**Collaboration**

**Workplace skill development**

**Leadership**

## **POSSIBLE TOPIC AREAS**

**TIME MANAGEMENT**

**EMPATHY**

**LEADERSHIP**

**PUBLIC SPEAKING/PRESENTING**

**ACCESSIBILITY**

**BIAS**

**CUSTOMER SERVICE**