

Day 1

Facilitator Guide

New Hire Training

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Icon Legend

Icon	Description	Icon	Description
	Duration (Time required for slide(s)/section(s)/topic(s))		Slide # (Slide number from the deck)
	Activity (Energizer, Leaderboard, All other Activities)		Transition
	Simulation		Quiz/Assessment
	Do (Facilitator Instructions)		Ask (Discussion/Probing Questions and Expected Responses)
	Talking Points (Speaker Notes)		

Training Agenda

Topic	Subtopics	Day	Duration
Module 1: Introduction to the Training	• Introduction • Icebreaker • Housekeeping • Training Agenda • New Hire Training Objectives	1	55 mins
	• Day One: Agenda • Day One: Objectives	1	5 mins
Module 2: About OnePay	• Our Company • Message from Our Leadership • Our Mission and Vision • Our Culture	1	20 mins
Break			10 mins
Module 3: Our Apps and Our Customers	• Understanding Our Customers • Value Proposition • Introduction to OnePay • Introduction to One at Work • Leaderboard • Why Do Customers Contact Us? • Our Ecosystem • Our Website • Help Center	1	180 mins
Lunch Break			30 mins
Module 4: Role of a Specialist	• A Specialist's Journey at One • Caring for Our Customers • Customer Service at OnePay • Our Customer Principles • Role of a Specialist • Tools for a Specialist	1	140

Break			10 mins
Module 5: Hear from our Customers	• Call 1: Bullseye or Miss? • Call 2: Bullseye or Miss? • Turning Insights into Action	1	55 mins
Break			10 mins
Module 6: Wrap-Up	• Making the Most of Training • Day 1 Quiz • EOD Hygiene Check	1	90 mins

Overview of Day One

Content Coverage:
Today's session will provide a solid understanding of the mission and vision of OnePay, our app, our customers, and the role of a specialist. This session will set the stage for deeper learning in the subsequent days.

Goal for the Day:

Ensure that specialists leave with a sense of excitement and pride about the program they are now a part of.

Duration: 8 hours

Materials Required:

- OnePay_NHT_Day1_FG.pdf
- M1_OnePay_NHT_Day1_Welcome to the Training_ILT_v3.0
- M2_OnePay_NHT_Day1_About OnePay_ILT_v3.0
- M3_OnePay_NHT_Day1_Our Apps and Our Customers_ILT_v3.0
- M3_OnePay_NHT_Leaderboard_Tracker.pdf
- M3_OnePay_NHT_Day1_Activity_Relating OnePay to Other Apps.pdf
- M3_OnePay_NHT_Navigating the Interface of OnePay.mp4 (Simulation)
- M4_OnePay_NHT_Day1_Role of a Specialist_ILT_v3.0
- M5_OnePay_NHT_Day1_Hear from Our Customers_ILT_v3.0
- M5_OnePay_NHT_Day1_Activity_Call Analysis Sheet_CustomerA.pdf
- M5_OnePay_NHT_Day1_Activity_Call Analysis Sheet_CustomerB.pdf
- M6_OnePay_NHT_Day1_Wrap-Up_ILT_v3.0

Reference:
Refer to the instruction manual (*OnePay_NHT_InstructionManual.pdf*) for details on how to use this facilitator guide.

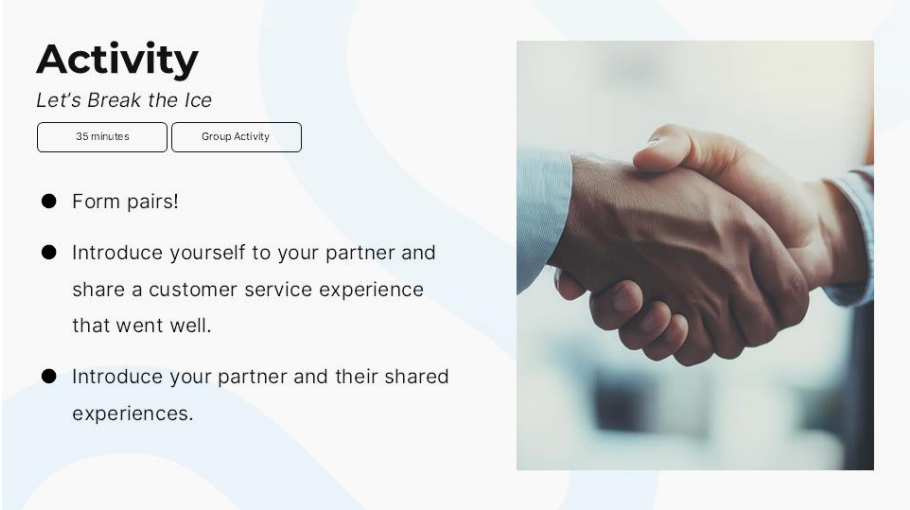
Introduction to the Program

Duration	2 minutes approx.
Slide: 1	
Do	For this training, ensure that you have a whiteboard, erasable notepads, the facilitator guide, markers, and a timer. Give a brief introduction about yourself and your background.
Talking Points	Welcome to our two-week training program for new hires. Hello, everyone! My name is ***[Facilitator Name]***, and I will be your facilitator for this training session.

Your Journey to Excel Starts Here

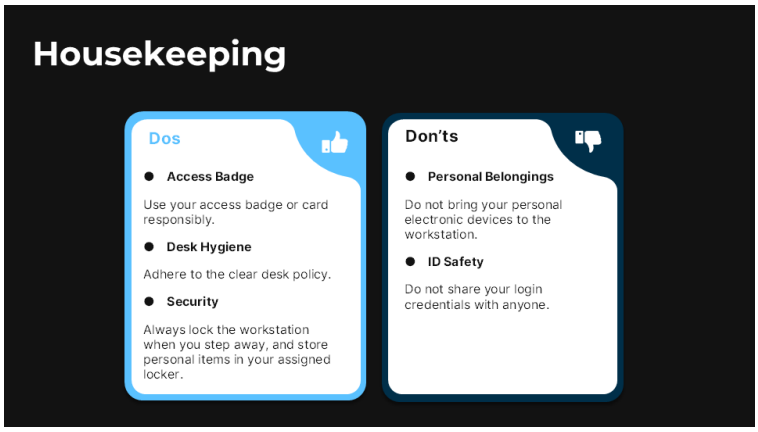
Duration	2 minutes approx.
Slide: 2	
Talking Points	In just two weeks, you'll go from a new learner to a problem-solver, helping our customers with challenges you can fix. We're here to support you in every step of the way to help you excel in your role as a specialist. This training isn't just about checking boxes, it's about learning how to connect, engage, and make a lasting impression with every customer interaction.
Transition	To kick things off, shall we break the ice first, know each other, and connect in a fun and interactive way?

Activity: Let's Break the Ice

Duration	35 minutes approx.
Slide: 3	
Activity	**Activity Name**: Icebreaker **Points:** NA **Objective:** To allow participants to introduce themselves and share a positive customer service experience. **Group/Pair/Individual:** Pair **Time Required**: 35 minutes **Materials Needed**: Timer **Activity Steps:** **1. Step 1 (2 minutes):** • Pair up the participants seated next to each other for the activity. In case the total number of participants is odd, keep three participants in one of the groups. **2. Step 2 (3 minutes):** • Instruct the participants to introduce themselves to their partner and share one positive customer service experience. • Let the participants know that they should focus on the details and emotions related to their experience, as their partner will introduce them and their story to the larger group. • Inform them that they will have three minutes for their introduction

	and experience sharing. **3. Step 3 (2 minutes per pair):** • Give each pair two minutes for introductions, where each participant will introduce their partner and their partner's story (if any). • Reiterate that the introductions should be brief. • Ask the participants to hold onto their thoughts about what went well, as there will be a discussion on it later.
 Do	Conduct the activity as per the instructions.
 Talking Points	Let's begin the icebreaker activity. In this activity, you will introduce yourself with a good experience of interacting with a customer care executive. Do you know positive customer service moments can leave a lasting mark, making customers remember their experience with you? Think about how you felt hearing your partner's story. I am sure it gave you a sense of pride. This is the difference you can make as a specialist. As you listened, did you notice any common themes? Maybe it was a personal touch, like active listening, going the extra mile, or showing empathy. To create such moments, your role isn't just about answering questions, it's about making customers feel supported. The main elements that stand out to create such moments are active listening and empathy.
 Transition	Moving on, let's cover a few housekeeping guidelines for maintaining a safe, organized, and secure work environment.

Housekeeping

Duration	4 minutes approx.
Slide: 4	
Talking Points	Remember, safety should always come first. Follow these housekeeping dos and don'ts to ensure a secure environment for everyone: • Use your access badge or card responsibly. Do not allow others to tailgate or follow you through access points. • Adhere to the clear desk policy. Keep your desk free of pens, notepads, and documents. • Store personal items in your assigned locker. Remember that phones, smartwatches, electronic devices, and food or drinks are not allowed in the workplace. • Do not share your login or ID credentials with anyone. Sharing your ID or credentials compromises our system's security and customer's privacy. • Always lock your workstation when stepping away, even for a moment, to prevent unauthorized access and to protect sensitive information.

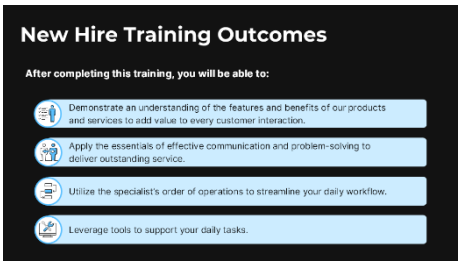
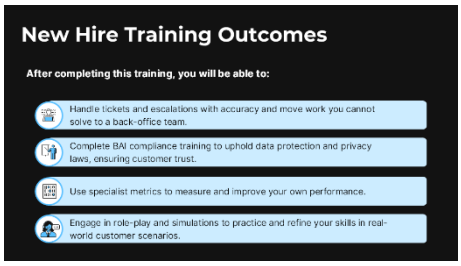
 Transition	With the housekeeping details taken care of, let’s move on to the training goals and check out the roadmap for how we’re going to build the skills you need.

New Hire Training Goals

Duration	10 minutes approx.
Slides: 5 and 6	 
Talking Points	Let's see where we're headed. The New Hire Training will equip you to handle any situation with confidence. Let's check out the training goals. <Read out the training goals presented on the slide> This training is structured into two distinct phases over two weeks. Each week will focus on critical aspects to help them in their new position. In the first week, you'll get to know all about OnePay, our customers, and tools to help them in their work. Your training begins with an exploration of OnePay's Vision and Mission. Who we are and what do we hope to achieve? This is where your journey starts, with purpose, passion, and a clear sense of direction. Day 2 is all about our customers, who they are and how to connect with them on a personal level. Say goodbye to scripts. This is about real conversations and building genuine relationships. On Day 3, you'll identify customer issues and provide solutions that impress. Additionally, you'll discover the banking features offered by OnePay Cash. Day 4 introduces OnePay Cash+ and other essential customer service tools. On Day 5, you'll learn about OnePay Retail cards, enhance your note-taking techniques, and gain insights into contact drivers. You'll uncover tickets on Day 6 and learn how to collaborate with back-office support to handle disputes and resolve complex issues. You'll also get to learn about OnePay Wallet, and practice note-taking using Zendesk. Finally, you'll take an assessment on Week 1

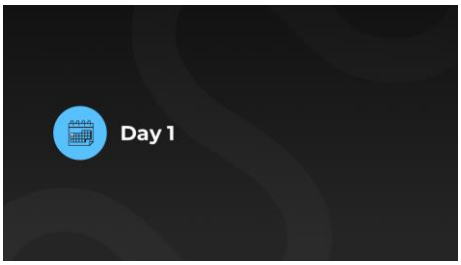
	topics. Day 7 is all about problem-solving in real time, handling incidents, outages, and emerging customer issues, managing difficult customers and turning complaints into opportunities for improvement. On the product front, you'll explore OnePay Loans and tools like CCAT and Guru. Day 8 is focused on you and how your performance shapes your success. You'll learn about specialist metrics and tools like Calabrio, Slack, and Zoom. On Day 9, you'll put your skills into action in real-world customer service scenarios. The day ends with a project work session, followed by an assessment to check your progress. Finally, we'll discuss your nesting plan and the exciting next steps in your development.
 Transition	Now that you know why you're here, let's see what you'll actually walk away with after this training.

New Hire Training Outcomes

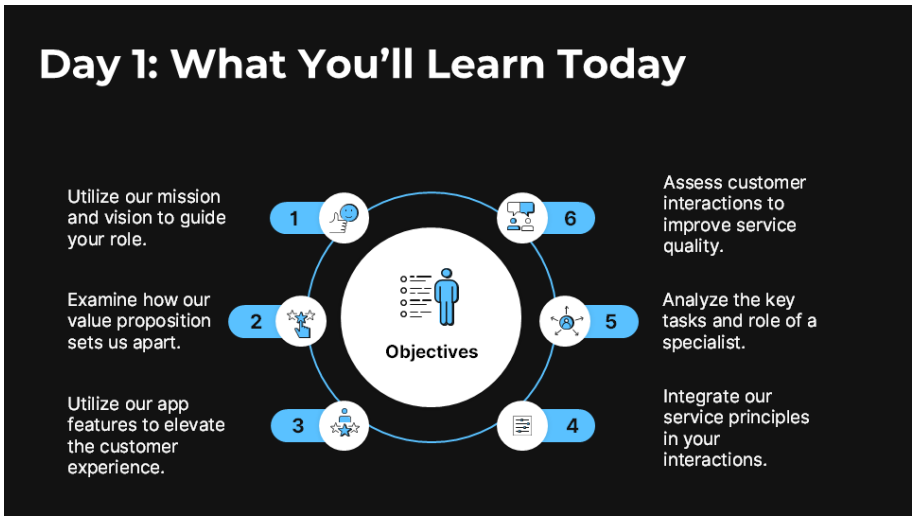
Duration	2 minutes approx.
Slides: 7 and 8	 
Do	Read the learning outcomes from this and the next slide and provide a brief explanation.
Talking Points	Here's what you'll learn to become an outstanding customer service specialist, equipped to solve problems, build connections, and deliver standout experiences!
Transition	With this brief idea of the training agenda and objectives for the next two weeks, let's begin the Day 1 session.

Module 1: Introduction to the Training

Day 1 Agenda

Duration	3 minutes approx.
Slides: 9 and 10	 
Talking Points	Today, our goal is to see the bigger picture, how your work directly influences our success and the satisfaction of those we serve. We want you to leave today feeling excited about what you're stepping into and ready to take on the challenges ahead! We have divided the day's training into the following modules: 1. We'll kick things off by laying out today's objectives. 2. Get to know OnePay and what makes us different. 3. Explore our app and learn how they're transforming the way we serve our customers. 4. Understand how you can make a real difference in customer experiences. 5. Get real insights from our customers. This is your chance to level up your skills. 6. We'll finish with a quick review and a quiz to lock in what you've learned, so you're prepped for Day 2.
Transition	Let's check out the objectives for Day 1 to effectively cover today's agenda.

Day 1: What You'll Learn Today

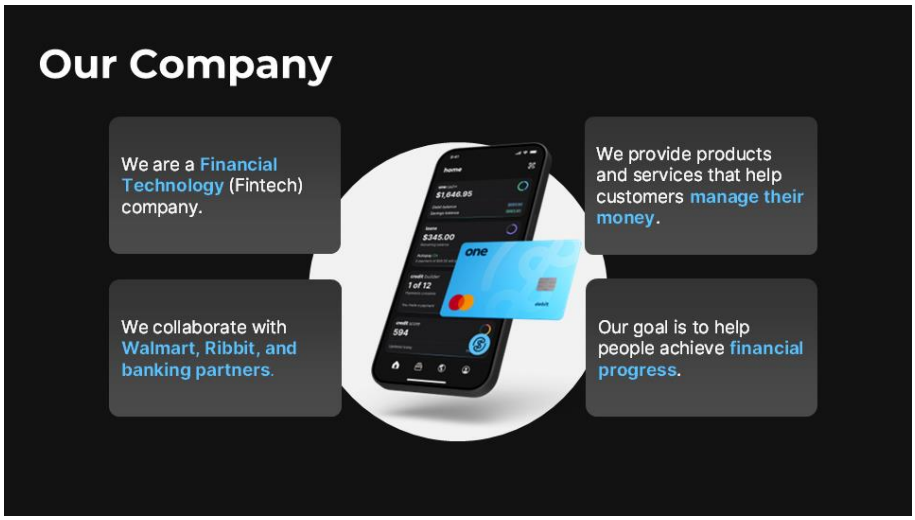
Duration	5 minutes approx.
Slide: 11	
Say	In this session, we'll explore how our mission guides our work, use our app features to improve customer interactions, and apply service principles to enhance our performance. We'll examine what it means to be a specialist, analyze calls, and identify ways to boost service quality, gaining the skills to excel.
Transition	Now that you are all set, let's talk about who we are as a company and how your role connects to our mission!

Module 2: About OnePay

Day 1: Agenda

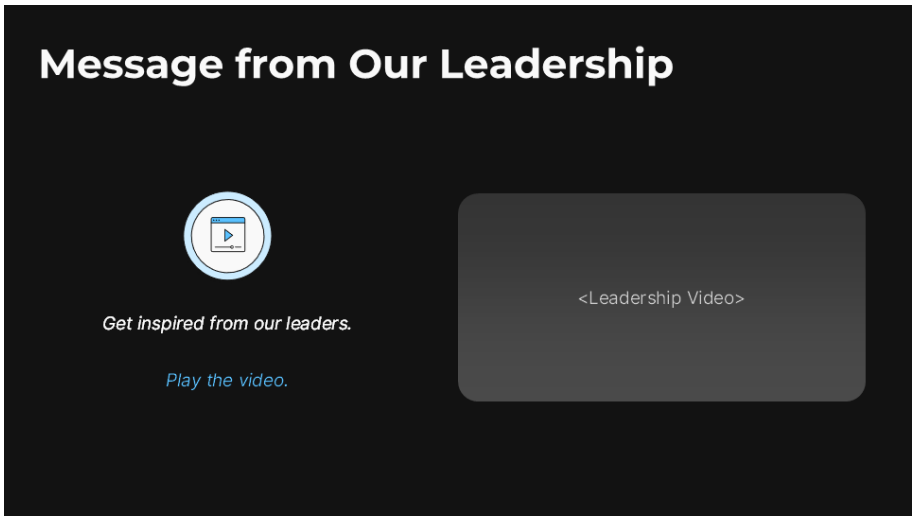
Duration	1 minute approx.
Slides: 1 and 2	 
Talking Points	Now that you're clear on today's goals, let's turn our focus to our company. We'll learn who we are and hear from our leadership team about the exciting role you play in our journey!

Our Company

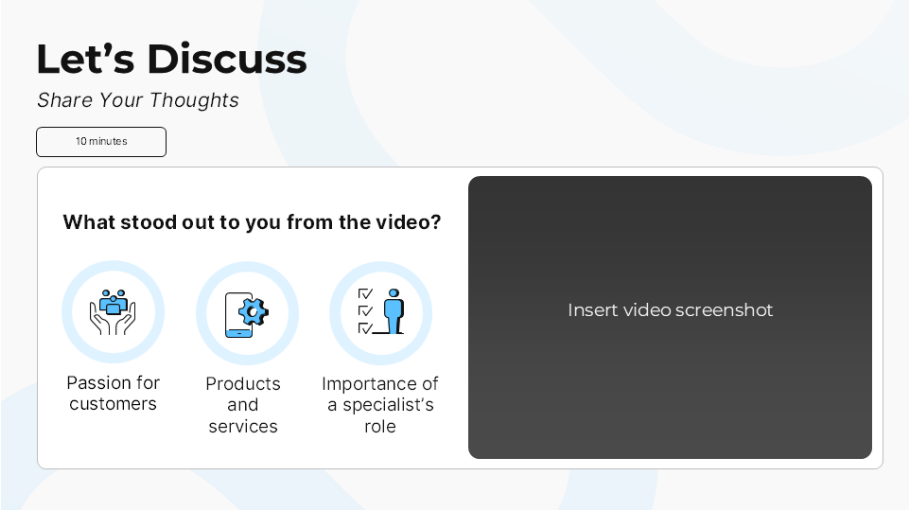
Duration	3 minutes approx.
Slide: 3	
Talking Points	OnePay is a Fintech company transforming financial services for customers. We're excited to share how we all play a role in this transformation.
Ask	What do we mean by a Fintech company? **Expected Responses:** • A company using financial technology platforms for service • A company that provides financial solutions • A financial company • A phone banking company • A digital payment company
Talking Points	A fintech company like Revolut or PAYTM uses technology to deliver innovative financial solutions and make banking services accessible to customers. At OnePay, we focus on creating seamless digital experiences. While we are not a bank, we partner with institutions like Coastal

	Community Bank to offer banking services through our app. Our tools empower customers to take control of their finances, whether it's saving, spending, accessing credit, or growing their money. Our goal is to help people achieve financial progress.
 Transition	Let’s move on to meet our leadership team, who will share their insights and show you how to achieve our organizational goals.

Message From Our Leadership

Duration	3 minutes approx.
Slide: 4	
Talking Points	Here’s a special video message from our leadership team. Let's watch and get inspired! Now you’ll hear from OnePay’s CEO, Omer.
Do	Play the video. Move to the next slide for a discussion after the video ends.

Let’s Discuss: Share Your Thoughts

Duration	10 minutes approx.
Slide: 5	
Do	• In the slideshow, you will find animated text that will appear with a click action to be used at the appropriate time during the discussion. Be mindful of these clicks when on this slide. • Gather responses from at least three or four participants. • Highlight how the company’s customer-focused approach directly impacts their role as a specialist.
Talking Points	Let’s take a moment to reflect.
Ask	What stood out to you the most? Any key moments or ideas that really made you think? **Expected Responses:** • Our passion for customers • Our products and services • Specialist’s role in customer service

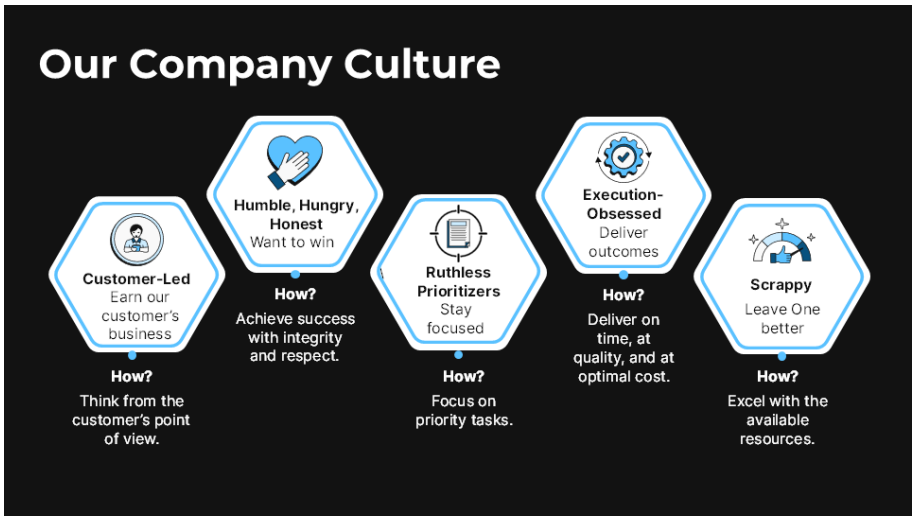
 Talking Points	***<In the slideshow, click for the onscreen debrief points to appear.>*** Great responses. At OnePay, we focus on making an impact for our customers through meaningful products and services. Our role is essential because we're on the front lines, delivering real value and creating positive experiences for our customers every day.
 Transition	Keeping in mind the message from the leadership, let's shift to something that drives it all, our company's vision and mission.

Our Mission and Vision

Duration	4 minutes approx.
Slide: 6	
Do	Use the probing questions to prompt participants to consider what it means to them, then assist them to understand its meaning in context to OnePay and its customers and how it connects to our mission.
Ask	What does financial progress mean to you? **Probing Questions**: • Think about financial progress in your life. (Think beyond just having more money. It could be about stability, achieving goals, or managing debt.) • What are some key milestones that might show someone is making financial progress? (Saving for a motorcycle/child's education/retirement, paying off debt, or investing for the future) • How do customers typically measure financial progress? (Improved credit scores, increased savings)

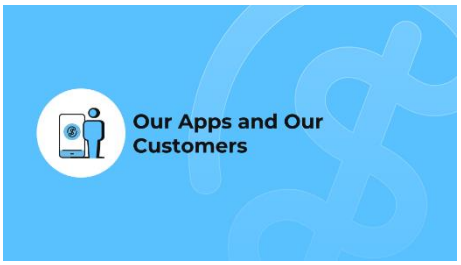
 Talking Points	Financial progress means different things to different people. Our mission and vision define OnePay's core purpose, guiding everything we do, and shaping how we aim to make a difference in our customers' financial progress. Our mission and vision are the "why" behind everything we do, from the products we offer to how we serve our customers. Our mission and vision reflect our company's core purpose and long-term aspirations. These aren't just words; they drive our actions, and are crucial to how we aim to make a difference in our customers' lives. Our mission is a simple one, yet powerful: financial progress.
 Transition	With the mission and vision in mind, let's talk about how we live those values every day, through our company culture.

Our Company Culture

Duration	3 minutes approx.
Slide: 7	
Talking Points	Our culture defines who we are and how we operate. We are committed to being customer-focused, always starting by understanding the customer's perspective to prioritize what truly matters to them. We value humility, drive, and honesty, striving for success with integrity and respect for everyone. We are dedicated to ruthless prioritization, concentrating on the critical few actions that create meaningful impact. We are obsessed to execute and deliver results on time, with quality, and at the right cost. We embrace resourcefulness, continuously seeking improvements with available resources to leave OnePay better than we found it.
Transition	Great work so far! Now, let's jump into the next module, where you'll take a closer look at our products and get to know our customers better.

Module 3: Our Apps and Our Customers

Day 1: Agenda

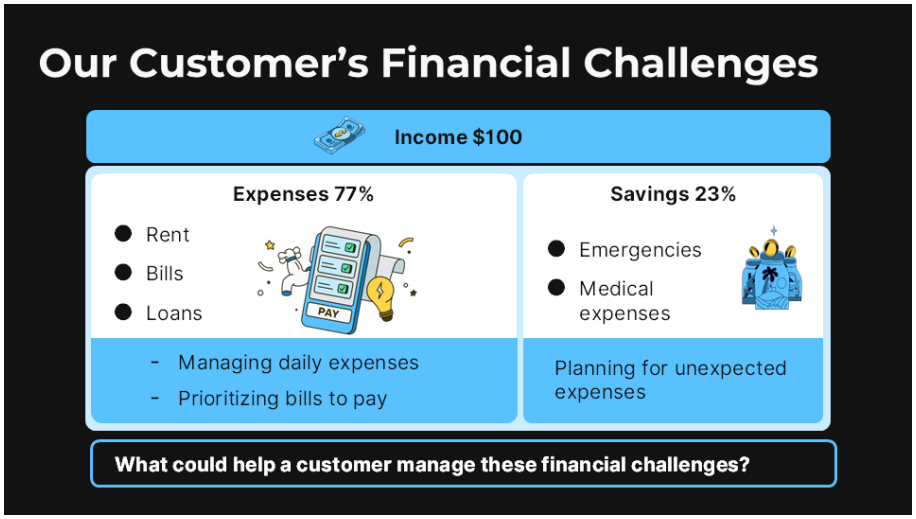
Duration	1 minute approx.
Slides: 1 and 2	 
Talking Points	Now that you have a brief idea of our company, let's talk about our apps, OnePay and One at Work. In this module, we'll also look at who our customers are and understand their challenges.

Understanding Our Customers

Duration	8 minutes approx.
Slides: 3 and 4	 
Talking Points	I'd like to introduce you to some of our customers. They're people just like us, managing dreams, responsibilities, and striving for a better financial future. But for many, making ends meet is a daily challenge. Our customers include hourly wage workers, single parents, rural communities, and even grandparents. They are everyday persons, typically day laborers like delivery drivers, fast food workers, or taxi drivers. They may be working multiple jobs and face significant barriers when it comes to banking and financial services. We'll look at a few of these barriers in a moment. ***<Move to the next slide.>***
Ask (Slide 4)	Think about a time when someone you know faced financial uncertainty. How did it feel knowing they could not cover some of their expenses?
Do (Slide 4)	Solicit responses from a few participants.

 Talking Points (Slide 4)	They probably felt frustrated with the constant worry of whether they could meet the basic financial needs. The stress and anxiety of not having financial security is a huge barrier for our customers. Think about how difficult it must be to feel that uncertainty about tomorrow. Explain the barriers as follows: • A large portion of our customers don't have access to a traditional bank account. Before having a OnePay account, these customers would pay money to take their paycheck to a check cashing center and pay a fee to access their cash. Check cashing fees can range from 1-12% depending on where they cash their checks. • Some are not tech-savvy, which can make it harder for them to navigate web browsers or mobile apps. • Many also have limited knowledge and access to financial services, either because they live in rural areas or simply don't have the options available in their communities. • Finally, there's often a lack of trust in traditional financial institutions, especially for those who have had negative experiences in the past or feel excluded from the system.
 Transition	Now that we have a clearer picture of who our customers are, let's explore the financial challenges they face every day.

Our Customer's Financial Challenges

Duration	10 minutes approx.
Slide: 5	

Talking Points

Note that this is the source for the figures shown on the slide: https://www.chase.com/personal/banking/education/budgeting-saving/average-american-monthly-expenses-and bills#:~:text=According%20to%20the%20same%202022,personal%20care%20products%20and%20books.

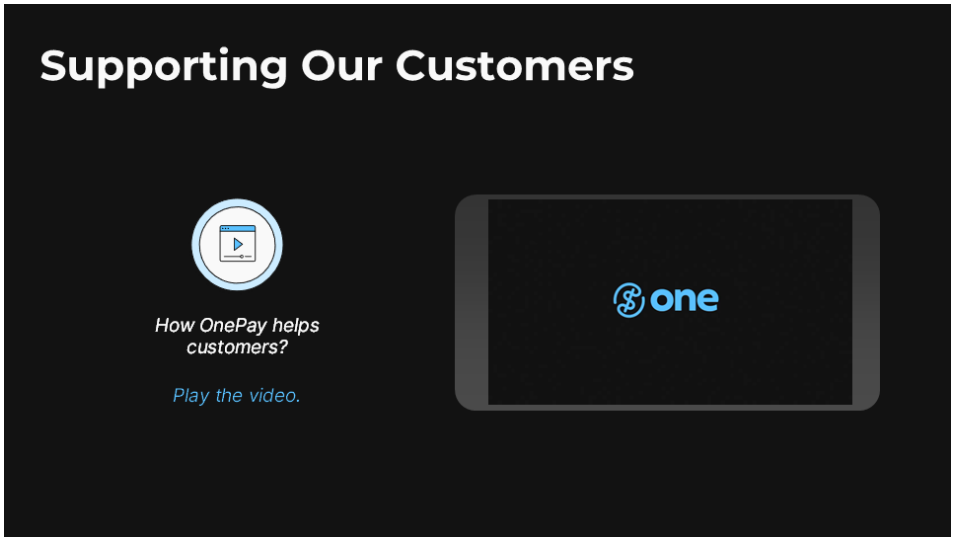
Managing finances can be complex. For many customers, after covering essentials, little is left for savings. What you're seeing on this slide is a glimpse into the complexity of our customer's financial situation. What will they do if an unexpected expense comes up? They don't have the luxury of a buffer or credit. They often put off some bill. Every person/family has a strategy on how they "stay afloat." They consider many factors to do what's best for their family.

Let me explain why managing finances isn't simple:

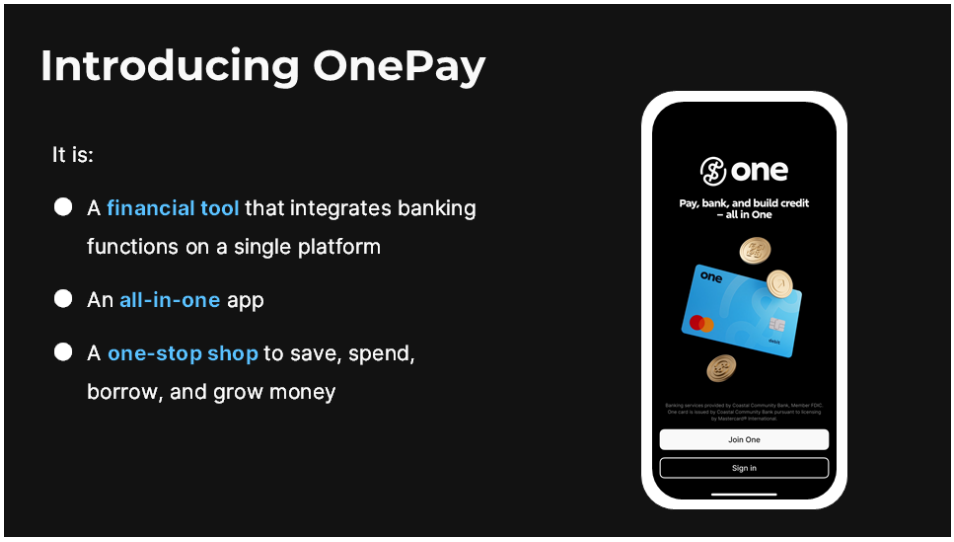
- Paydays come at different times, but bills for rent, utilities, and loans are always due on fixed dates. That's where the challenge begins.
- Each month, customers have to manage these expenses, making tough decisions about which bills to pay. Their goal is to avoid late fees, keep the lights on, and make sure there's food on the table.

 Ask	What do you think could help a customer manage these challenges? **Expected Responses**: • A financial app • Financial tools • An account tracker
 Do	Solicit responses from a few participants. Pay attention to answers that point to financial tools or apps, and steer the discussion toward the value of a financial app.
 Transition	Financial tools simplify money management, helping people overcome their financial challenges. Now that we've explored the challenges our customers face, let's see how OnePay supports them.

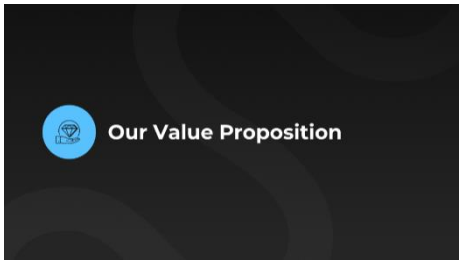
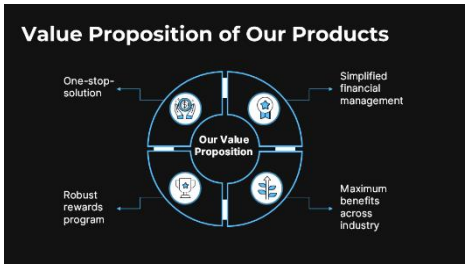
Supporting Our Customers

Duration	2 minutes approx.
Slide: 6	
Talking Points	You've seen the financial hurdles our customers deal with. OnePay is the solution. Let's watch a video to see how we can ease those challenges.
Do	Play the video.
Transition	You've seen a quick overview of OnePay. Now let's see how it simplifies our customers' lives.

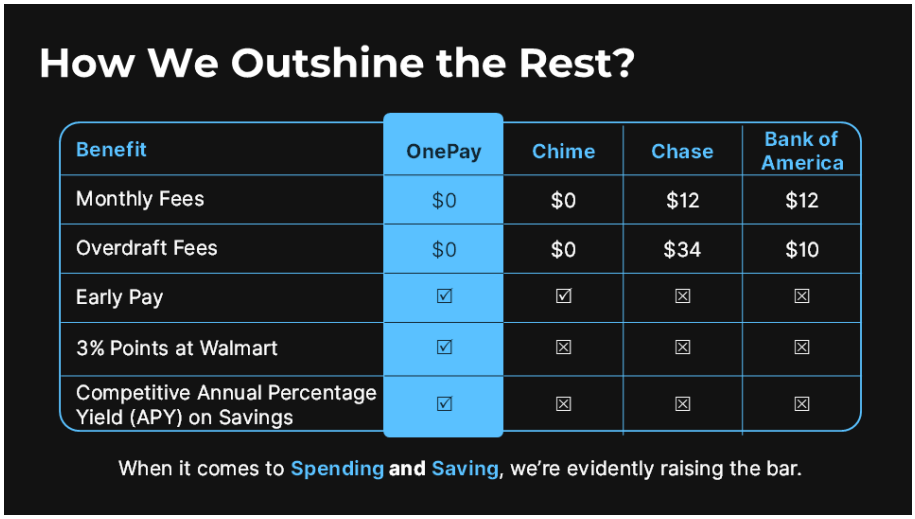
Introducing OnePay

Duration	3 minutes approx.
Slide: 7	
Talking Points	You wouldn't use five different apps just to check the weather, right? Why use multiple apps for banking needs when OnePay combines everything our customers need in a single app? It's like having a personal assistant in the pocket. Whether our customers are saving, paying bills, or looking for a loan, we have them covered. Think of OnePay as a financial toolkit, all in a single, easy-to-use app. We partner with banks, such as Coastal Community Bank, to offer banking services. Our company's vision to save, spend, borrow, and grow money using a single app.
Transition	This is the goal of OnePay: to be a super app. With this goal in mind, let's take a closer look at how we deliver on this goal.

Value Proposition of Our Products

Duration	5 minutes approx.
Slides: 8 and 9	 
Talking Points	A value proposition conveys the unique benefits of a product or service to a customer. Imagine you are talking to a customer who's overwhelmed by financial stress of bill payments, savings, and credit score. Now, picture telling the customer about a solution that not only simplifies their finances but also gives them maximum benefits. That's the power of our value proposition. OnePay's value proposition starts with the simplicity which we offer and how we consolidate everything a customer needs in a single platform. • We provide industry-leading benefits. • With OnePay, customers don't need to shop around for different banking services. • Our rewards program is among the best in the industry. Customers can earn rewards in the form of points on everyday purchases. This makes their experience with us not just about banking but also about gaining additional value with every transaction.
Transition	We'll explore what sets us apart from the competition.

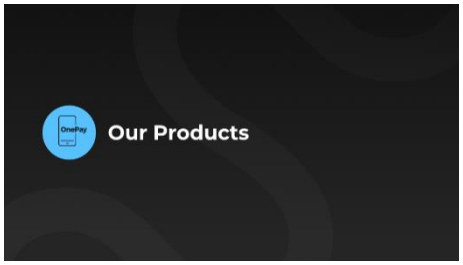
How We Outshine the Rest?

Duration	4 minutes approx.
Slide: 10	
Do	Ask a participant to read the figures from the slide. Highlight how OnePay offers better value.
Talking Points	Here's a comparison that highlights why we are the smarter choice for our customers, based on data from June 25, 2024. As you can see, OnePay's offers provide greater benefits to customers compared to competitors like Chime, Chase, and Bank of America. We have clearly set the standard for spending and saving. Note that OnePay will no longer provide cash back directly to customers. Instead, we are transitioning to a points program where transactions will earn points that can later be redeemed for cash back.1 point equals 1 cent, so $20 would be 2000 points. Points can be earned through transactions, promotions, and bonuses, and will be redeemable for cash back at a later time.
Transition	Let me now show you how we create value for our customers.

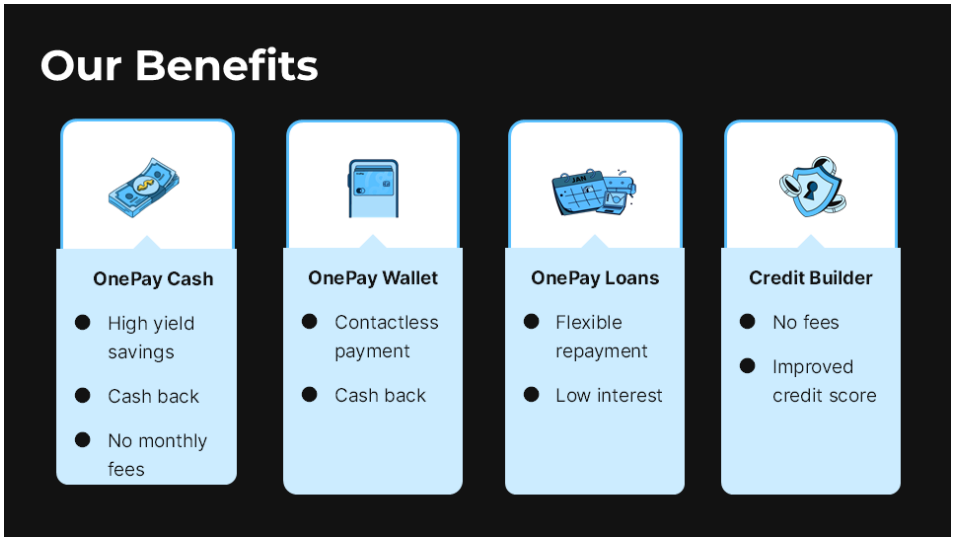
Delivering the Best to Our Customers

Duration	2 minutes approx.
Slide: 11	
Talking Points	A strong and well-defined value proposition meets customer needs and offers solutions that make a real impact. It helps differentiate us in the market and fosters long-term customer loyalty.
Transition	Now that you know how we add value for our customers, we'll explore the products that make it all happen.

Our Products

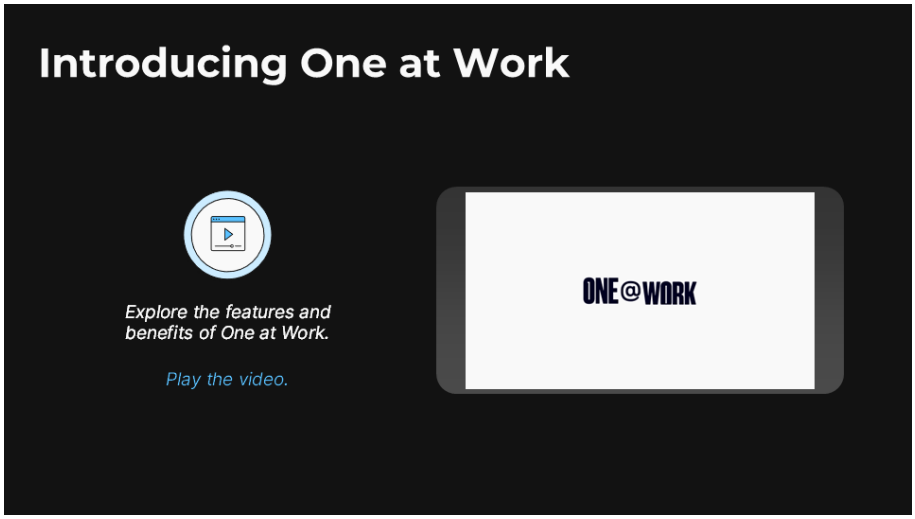
Duration	5 minutes approx.	
Slides: 12 and 13		
Talking Points	OnePay offers a wide range of products and services designed to help customers. Some of our important products include OnePay Cash, OnePay Wallet, OnePay Loans, and Credit Builder. • OnePay Cash account is a demand deposit account or a checking account. • OnePay Wallet is a contactless payment option. Customers can use Wallet to pay at Walmart using their credit or debit card and their phone. • OnePay Loans is a lending payment option completed at the point of sale. • OnePay Cash customers can opt for Credit Builder. This helps them build their credit score. We will learn more about these products in the upcoming days of the training.	
Transition	Now that we've briefly introduced our core products, let's highlight the benefits they bring to our customers.	

One: Benefits

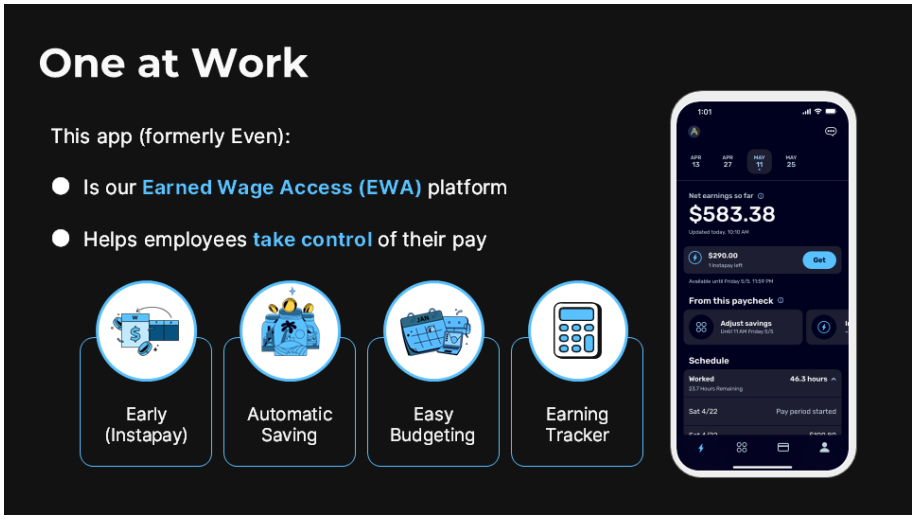
Duration	8 minutes approx.
Slide: 14	
Talking Points	Each of our product solves real problems, adds value, and meets customer needs: • With OnePay Cash, customers are not just saving, they're earning! Imagine a savings account that provides cash back and offers protection when they need it the most. OnePay Cash customers can unlock a group of benefits once they receive $500 or more in direct deposits in a calendar month. This group of benefits is known as OnePay Cash+. OnePay Cash+ customers enjoy the benefit of typically having no fees on most services. This means no surprise charges or worrying about extra costs. • OnePay Wallet has made Walmart in-store, online, and app payments faster, safer, and more rewarding. With just a tap, customers can make payments and also earn cash back. It's convenience and value in one simple solution. • With OnePay Loans, customers get the flexibility to repay and enjoy low interest rates. It's all about making borrowing easier and more affordable. • Credit Builder is designed to help customers take control of their credit. It gives them the tools to build credit without the burden of fees, while improving their credit score along the way.

 Transition	Apart from OnePay, we also have another app, One at Work.

Introduction to One at Work

Duration	3 minutes approx.
Slide: 15	
Do	Play the video.
Talking Points	Alright, let's check out a video on One at Work! It's an app designed to help employees manage their pay.
Transition	Did you see the ease with which customers can get started, the perks it offers, and how it seamlessly fits into their financial routine. Now that you've seen the basics of One at Work, let's see how employees can use it to take control of their finances.

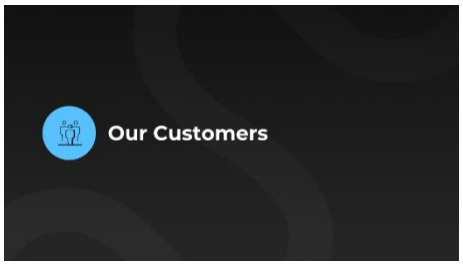
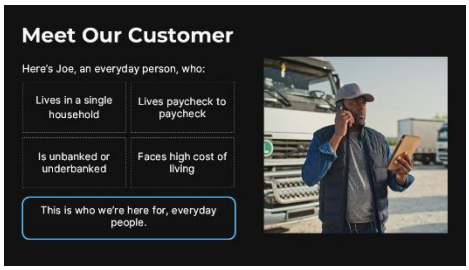
One at Work

Duration	3 minutes approx.
Slide: 16	
Talking Points	One at Work is our Earned Wage Access (EWA) platform. EWA is a tool that gives employees early access to wages for hours already worked. One at Work partners with Walmart to offer EWA to Walmart employees. Other employers too can partner with One at Work to provide a multitude of benefits to their employees. Employees can: • Use the Instapay feature of the app to access their wages early. • Choose a percentage of their pay to save. • Connect this app to their bank account to monitor their monthly expenses and plan their budget. • Track how much they will make per shift and per paycheck.
Transition	We'll now take a closer look at our partnership with Walmart.

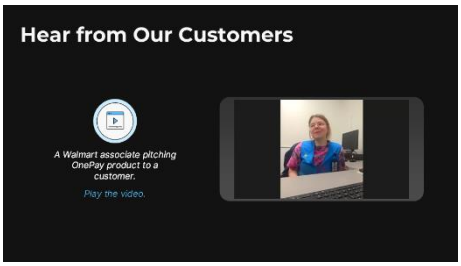
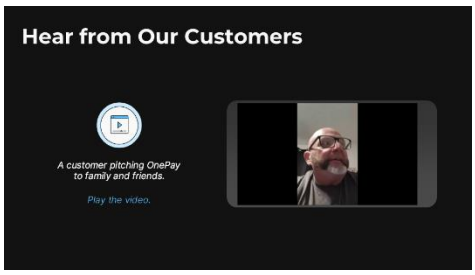
OnePay and Walmart Partnership

Duration	2 minutes approx.
Slide 17	
Talking Points	Think if customers could not only manage their finances but also shop for everyday essentials at a large retail store such as Walmart. That would be very convenient. OnePay's integration with Walmart brings this convenience to life. We have partnered with Walmart to offer additional benefits to customers who shop at Walmart. Walmart integration isn't just about shopping. It offers a seamless way for customers to pay for the shopping, earn cash back, and even add or take out cash.
Transition	This integration provides significant value to our customers and offers the best way to shop at Walmart. To give you a clearer picture, let's proceed to know how our app helps our customers.

Meet Our Customer

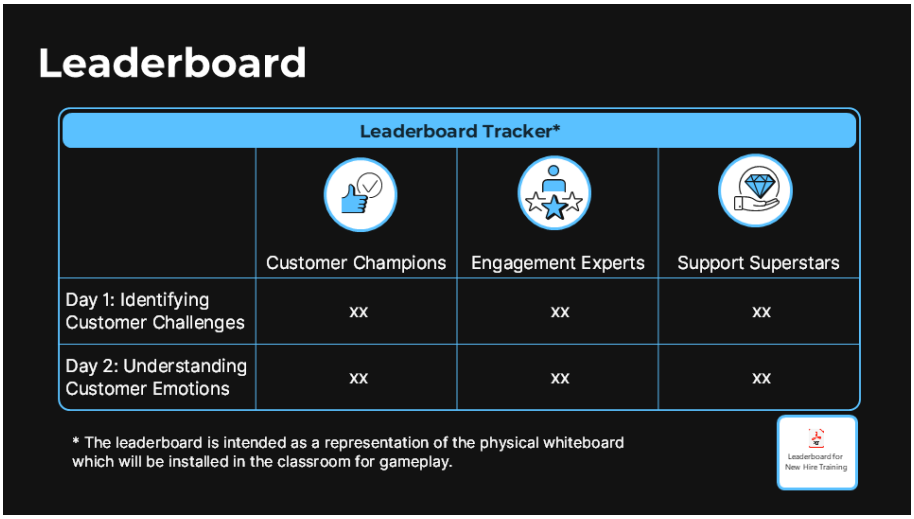
Duration	4 minutes approx.
Slides: 18 and 19	 
Talking Points	Let's start by meeting someone you all know, an everyday person. Let's call him Joe. • Joe is a worker trying to make ends meet. He lives with his wife and two kids and doesn't have the luxury of living in a multigenerational home. He lives in a single household and works hard to support his family. • He lives paycheck to paycheck and gets paid every two weeks. It's the middle of the month: Rent is due in a few weeks, and Joe is hit with a car repair bill that needs to be paid immediately. • Joe doesn't have a bank account and cashes checks at a local store. Every transaction comes with a fee, whether to cash paychecks, pay bills, or send money. The financial system isn't working for Joe; it's working against him. Joe doesn't have a savings account to plan for emergencies and finds it difficult to build credit, get a loan, or avoid high-interest payday loans. • As Joe juggles these financial pressures, he is facing the same high cost of living as everyone else, rising grocery prices, gas, and rent. For Joe, every dollar counts. This is who we're here for, for the everyday American people who are working hard, sometimes facing financial hurdles, but who deserve financial tools that meet them where they are.
Transition	Moving on, let's hear directly from a Walmart employee about these benefits.

Hear from Our Customers

Duration	4 minutes approx.
Slides: 20 and 21	 
Do	Play the video. Move to the next slide.
Talking Points	Let's watch real-world examples of how customers perceive us and what they have to say. The first video shows a customer, Karlee, an employee of Walmart, pitching a OnePay debit card to Walmart customers. She explains a few card benefits, such as fee waivers and direct deposits.
Do	Move to the next slide. Play the video.
Talking Points (Slide 21)	Here's another video. In this video, Timothy, a customer, talks about how he convinced his ex-wife and his girlfriend to download and use OnePay. As you watch, think about the benefits and features that resonate with the customers and how it aligns with what you have learned so far.

 Transition	These videos provided insight into how we address customer needs, but it is important to remember that each customer faces unique financial challenges. Such customer challenges will be explored in the next activity. But before that, we'll turn up the energy with a friendly competition board, the leaderboard.

Leaderboard

Duration	5 minutes approx.
Slide: 22	

Do

The training uses the concept of a leaderboard to inculcate a sense of healthy competition and to make the training interesting and fun. For this purpose, the class is divided into three teams, and the leaderboard is used to keep track of the points won by each team for the group activities.

The leaderboard shown on the slide is intended as a representation of the physical whiteboard which will be installed in the classroom for gameplay.

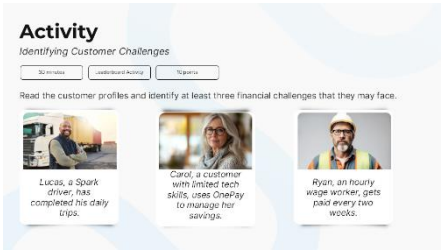
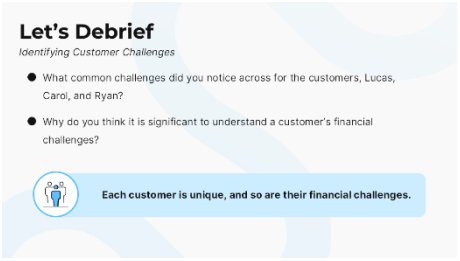
Note:

- Use the *M3_OnePay_NHT_Leaderboard_Tracker.pdf* to keep track of scores. Write down the leaderboard activities on the whiteboard to keep track of scores.
- Score each group activity out of 10 points and add the points to the leaderboard.
- Announce the winner at the end of Week 2 and award them a prize or memento.

Read aloud the team names from the slide. Then, form 3 teams and inform the participants that this team structure will be used for the leaderboard activities

 Talking Points	Throughout the training, we'll include some extra elements to keep things engaging, and the leaderboard is one of them. To keep things fun and competitive, we introduce the leaderboard, where your team's performance in group activities will earn points. Every interaction, every point counts, and the race to win starts now! There will be three teams as mentioned on the slide. As a team they should: ● Participate in various group activities throughout the week. ● Earn points for each group activity. All the best for the upcoming activities! Be proactive and contribute to your team's success. Enjoy the friendly competition, but the real reward is mastering the skills that will make you a successful specialist.
 Transition	Let's begin the activity.

Activity: Identifying Customer Challenges

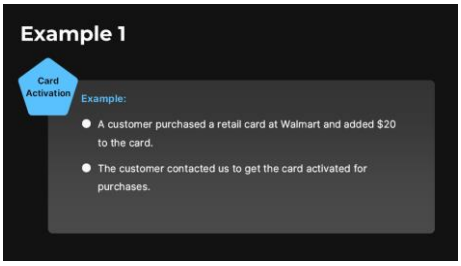
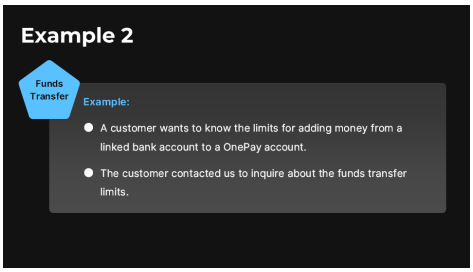
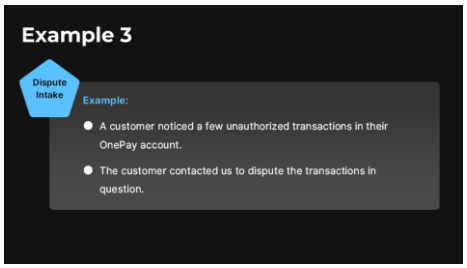
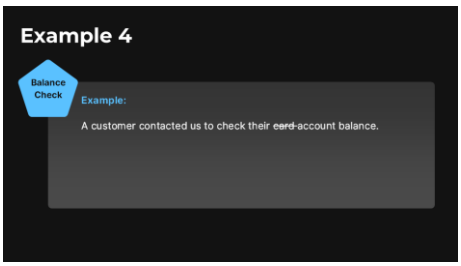
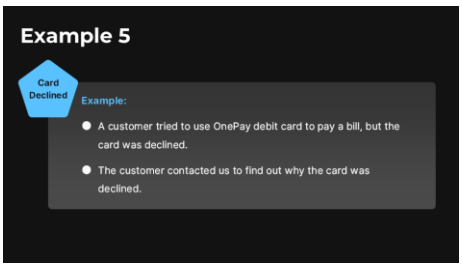
Duration	30 minutes approx.
Slides: 23 and 24	 
Activity	Spark Drivers is a subsidiary of Walmart. They are third-party delivery drivers who are paid after every delivery into a OnePay account. **Activity Name**: Identifying Customer Challenges **Leaderboard Activity**: Yes **Points**: 10 **Objective**: To identify the financial challenges of a customer based on the customer profiles. **Group/Pair/Individual**: Group **Time Required**: 30 minutes (20 minutes for the activity and 10 minutes for a debrief) **Materials Needed**: Erasable notepads, markers, timer **Activity Steps:** **1. Step 1 (1 minute):** • Introduce the purpose of the activity. This will be a leaderboard activity. Three customer profiles are listed on the slide for the three teams. • Provide a marker and an erasable notepad to each group. • Allot a customer to each team and ask them to identify at least three financial challenges the customer may face and explain why. **2. Step 2 (5 minutes):** • Give the teams five minutes to discuss among themselves and jot down the challenges in the notepad.

	3. Step 3 (7 minutes): • Invite a member from each team to present the challenges and rationale for their customer profile to the class. • Allow two minutes for the presentation. • Award points to each team as per the scoring rubric. **Scoring Rubrics:** • Demonstrated teamwork and collaboration: 1 point • Identified at least three challenges correctly: 3 points • Presented the challenges and explained the rationale: 6 points **Expected Responses:** Lucas: • Will the earnings on trips transfer instantly? • When will the tip be credited? • Will the incentives arrive weekly? • Will there be any technical issue with the app during the trip? • Will the customer feedback rating affect the tips? Carol: • How to identify the eligible purchases for each cash back? • How to transfer funds? • How to deposit money in the account? • Will it be secure to make money transfers or payments? Ryan: • How to save for the future? • How to get immediate access to wages for unforeseen expenses? • How to manage monthly bills? • How to keep track of earnings?
 Do	In the slideshow, you will find animated text that will appear with a click action to be used at the appropriate time during the discussion. Be mindful of these clicks when on this slide. Conduct the activity as per the instructions. Update the leaderboard with the points. Move to the next slide for a debrief.

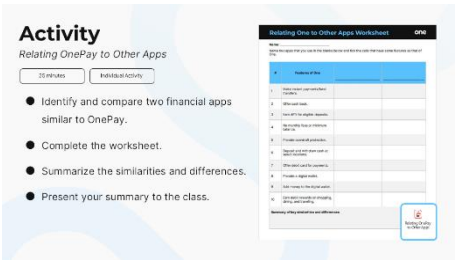
 Do (Debrief)	Thank the participants and facilitate a group discussion. Ask the questions listed on the slide and solicit answers from a few participants. Use the probing questions to guide the discussion. Steer the discussion to highlight why it is essential to understand customer challenges before offering any solution. ***<In the slideshow, click for the onscreen takeaway to appear.>***
 Ask (Debrief)	**Ask:** • What common challenges did you notice across for the customers, Lucas, Carol, and Ryan? • Why do you think it is significant to understand a customer's financial challenges? **Probing Questions**: • Do you think these customers have the same or different needs? Why? • How do these challenges reflect the diversity of our customers' financial situations? • Why do you think understanding these challenges helps us serve our customers better? • How would your approach change if you knew more about each customer's specific challenge? • What could happen if we assume all customers have the same issues? • How does knowing a customer's unique challenge help create a more personalized experience? **Expected Responses**: • Question 1: Security concerns, technical issues, privacy concerns, app functions • Question 2: Tailor our approach in offering solutions and communicate how OnePay can alleviate financial stress and improve financial well-being.
 Talking Points (Debrief)	Remember, Lucas, Carol, and Ryan all come from different backgrounds and have different financial needs Great work, teams. The fundamental takeaway from this activity is that each customer faces unique financial challenges that impact their financial stability. Only when you understand the customer's problems accurately can you offer solutions. Empathize with them to understand their problems and address them effectively.

 Transition	Now that we've talked about the challenges our customers deal with, let's dive into some real examples of why they reach out to us for help.

Why Customers Contact Us?

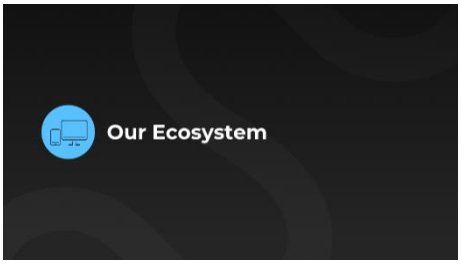
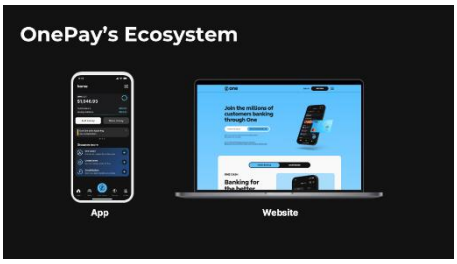
Duration	7 minutes approx.
Slides: 25 to 30	     
Do	Ask a participant to read the top five reasons why customers contact us. Move to the next 5 slides. Ask a participant to read the example from each slide.
Transition	Now that you've learned about the reasons why customers contact us, let's proceed with an activity.

Activity: Relating OnePay to Other Apps

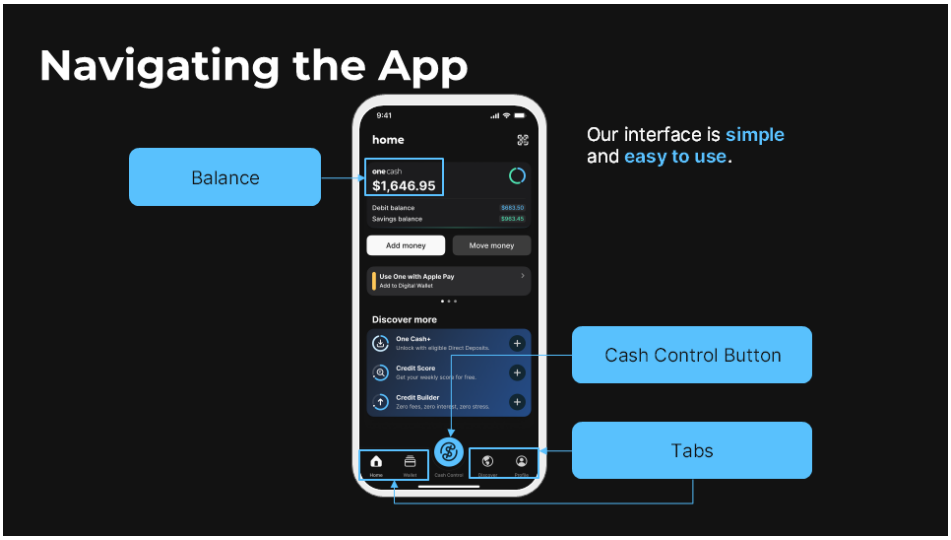
Duration	15 minutes approx.
Slides: 31 and 32	 
Activity	**Activity Name:** Relating OnePay to Other Apps **Leaderboard Activity:** No **Objective:** To relate the features of OnePay with other similar apps. **Group/Pair/Individual:** Individual **Time Required:** 25 minutes (15 minutes for the activity and 10 minutes for a debrief) **Materials Needed:** Erasable notepads, markers, and *M3_OnePay_NHT_Day1_Activity_Relating OnePay to Other Apps.pdf* **Activity Steps:** **1. Step 1 (1 minute):** • Introduce the purpose of the activity. The participants have to identify two financial apps that they use in their daily lives and compare the features of OnePay with these apps. For example, in India, OnePay can be related to Paytm and Spark Driver to Zomato. • Provide each participant with an erasable notepad and ask them to create a table like the one on the slide. They can use the listed features or add others. • Ask them to refer to *M3_OnePay_NHT_Day1_Activity_Relating OnePay to Other Apps.pdf*. **2. Step 2 (5 minutes):** • Set the timer for five minutes. • Ask the participants to create the table in their erasable

	notepads. **3. Step 3 (14 minutes):** • Each participant should provide a summary of their comparison and highlight how OnePay compares with other apps.
 Do	Conduct the activity as per the instructions. Move to the next slide for a debrief. In the slideshow, you will find animated text that will appear with a click action to be used at the appropriate time during the discussion. Be mindful of these clicks when on this slide.
 Talking Points (Debrief)	You've seen how different apps serve separate financial needs, one for payments, another for savings, and maybe another for budgeting.
 Ask (Debrief)	What makes OnePay different from other apps you've used? **Expected Responses:** • Seamless banking experience • Ease of payments and transfers • Multiple functions in a single app • No need to switch apps for various financial needs
 Talking Points	**<In the slideshow, click for the onscreen debrief to appear.>** Talk about how OnePay brings all financial tools together, so customers don't have to juggle multiple apps. It's designed to handle everything from payments to savings to budgeting, making it easier for customers to manage money.
 Transition	Now that we've learned how OnePay stands out, let's learn about OnePay's ecosystem.

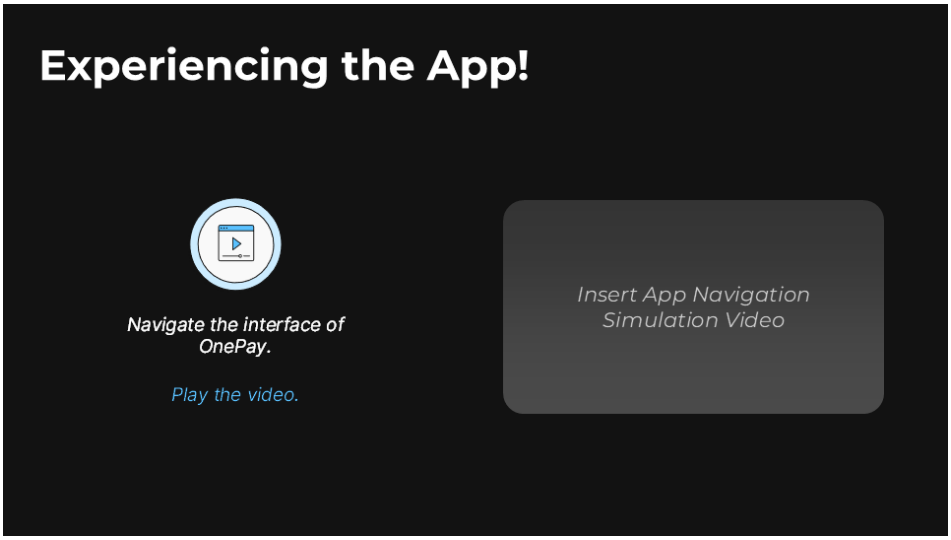
Our Ecosystem

Duration	1 minute approx.	
Slides: 33 and 34		
Talking Points	Let's now explore our ecosystem, which consists of two elements.	
Do	Ask a participant to read the elements of the ecosystem from the slide.	
Transition	We'll start by examining the first element of our ecosystem: our app	

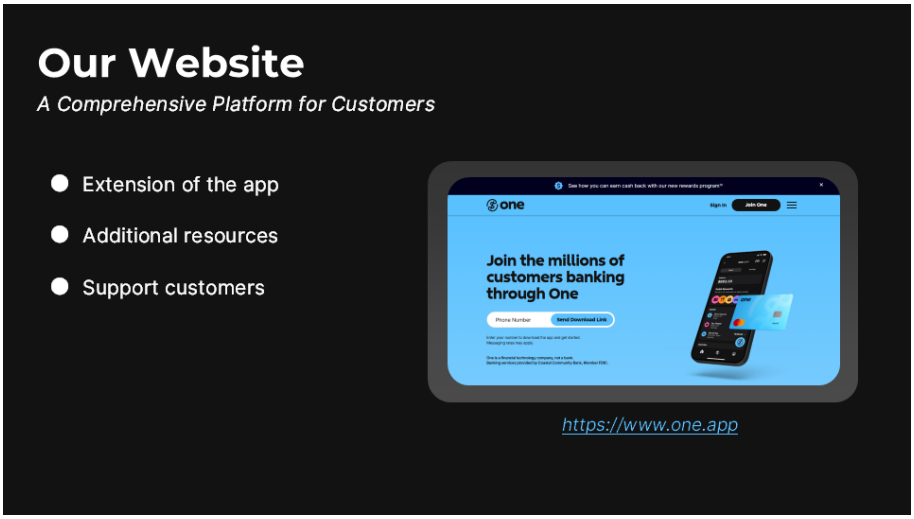
Navigating the App

Duration	3 minutes approx.
Slide: 35	
Talking Points	Now, let's take a look at the app interface. This is how customers will navigate through OnePay. It's simple, intuitive, and designed to make their financial tasks easy to manage. Every detail of the OnePay user interface is designed and created with customer experience in mind. When you open the app, the home screen displays the account balance, the Cash Control button, and four tabs.
Transition	Now, we'll experience the app interface through a simulation.

Experiencing the App!

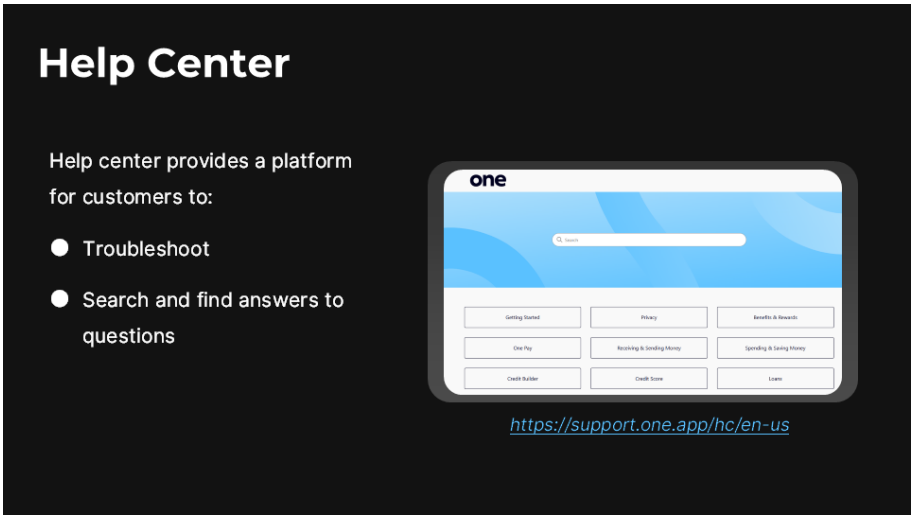
Duration	3 minutes approx.
Slide: 36	
Do	Play the video.
Talking Points	Let’s watch a simulation of OnePay interface.
Transition	We’ll move on to the next aspect of our ecosystem, website.

Our Website

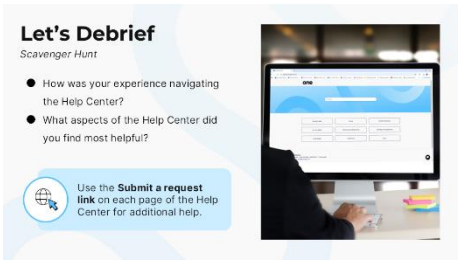
Duration	10 minutes approx.
Slide: 37	
Talking Points	Our website serves as an extension of the app, providing customers with additional resources, information, and support. You can explore the website to familiarize yourself with its homepage, navigation, and the various features it offers. To access our website, simply open the web browser and enter www.oneapp.com into the address bar. This will take you directly to the homepage, where you can begin exploring.
Do	Give the participants 5 minutes to access the website and explore the features. Ask the question and solicit answers from the participants.
Ask	What are your thoughts on the clarity of the information presented on our website? **Expected Responses:** • Clear information on products • Difficult to find information

 Transition	Next, we'll focus on a key feature of the website: the Help Center.

Help Center

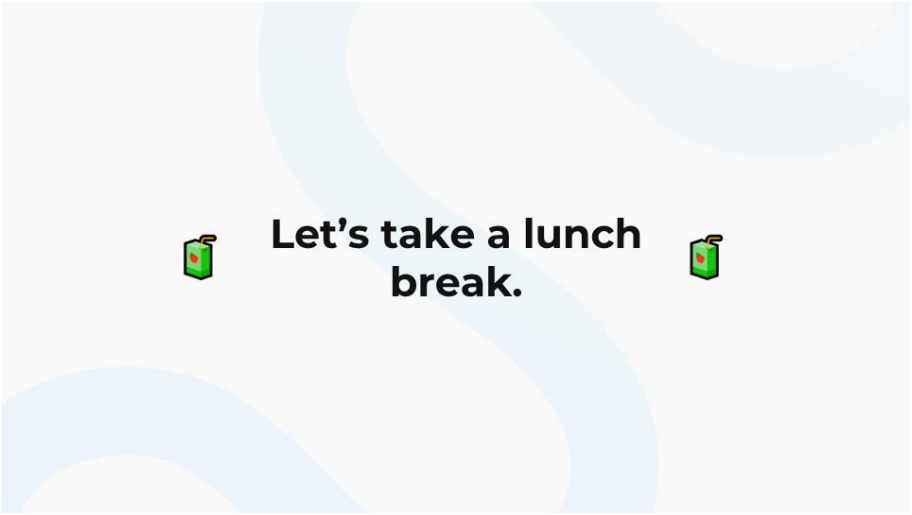
Duration	2 minutes approx.
Slide: 38	
Talking Points	The Help Center provides a platform for customers to: • Troubleshoot without the need to contact customer service. • Search and find answers to common questions. This is the link to access the Help Center: https://support.one.app/hc/en-us
Transition	Now that we've explored all the elements of our ecosystem, let's conclude this module with an activity.

Activity: Scavenger Hunt

Duration	30 minutes approx.
Slides: 39 and 40	 
Activity	**Activity Name**: Scavenger Hunt **Leaderboard Activity**: No **Objective**: To explore the Help Center to find information and create a table. **Group/Pair/Individual**: Group **Time Required**: 30 minutes (20 minutes for the activity and 10 minutes for a debrief) **Materials Needed**: Erasable notepad and markers **Activity steps:** **1. Step 1 (2 minutes):** ● Form four groups. ● Assign a topic to each group. ● Distribute erasable notepads and markers to each group. **2. Step 2 (15 minutes):** ● Ask each group to access the website Help Center, find information on the assigned topic, and create a table with the required information. (https://support.one.app/hc/en-us) ● Ensure the table includes: ○ Important information ○ Navigation path ○ Features/benefits ● Allow 15 minutes for this activity.

 Do	Conduct the activity as per the instructions. Move to the next slide for a debrief. In the slideshow, you will find animated text that will appear with a click action to be used at the appropriate time during the discussion. Be mindful of these clicks when on this slide. Discuss each group's table. Focus on the clarity of the information presented and the features covered in the table. Highlight missing features or benefits, if any. Ask the questions on the slide. Use the probing questions to conduct a discussion.
 Ask (Debrief)	**Ask:** • How was your experience navigating the Help Center? • What aspects of the Help Center did you find most helpful? **Probing Questions:** • Were there any parts of the Help Center that you found difficult to navigate? If so, what were they? • Did you find it easy to locate the information you were looking for? Why or why not? • In what situations do you think customers might prefer using the Help Center over calling support?
 Do (Debrief)	***<In the slideshow, click for the onscreen key takeaway to appear.>*** Discuss the importance of easy navigation. Highlight that the Help Center contains a wealth of information and how this information can empower customers to understand and use our products and services. Point out the **Submit a request** link available on each page of the Help Center and explain how it can assist customers.
 Transition	This brings us to the end of the third module. In the upcoming module, we'll explore your role as a specialist.

Lunch Break

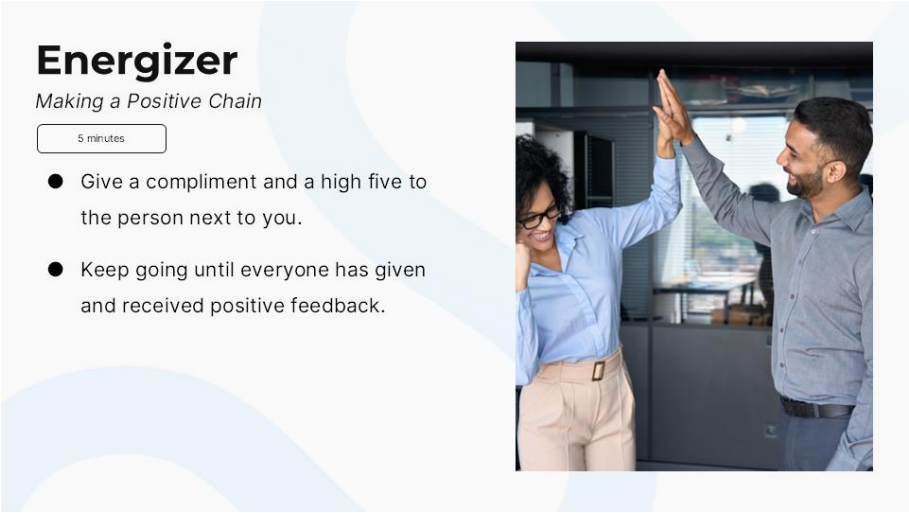
Duration	30 minutes approx.
Slide: 41	
Do	Ask the participants to take a lunch break.

Module 4: Role of a Specialist

Day 1: Agenda

Duration	1 minute approx.
Slide: 1	
Talking points	You know that our customers rely on our products and services for their financial needs.
Ask	What happens when our customers need help with these products or services? **Expected Response:** They call customer service.
Talking points	Exactly. And that's where you come in as a specialist. So, what is your role as a specialist? In this module, you'll discover how caring for customers and understanding the basic principles of service are crucial to your role, along with the tools you'll use to make every interaction count.

Energizer: Making a Positive Chain

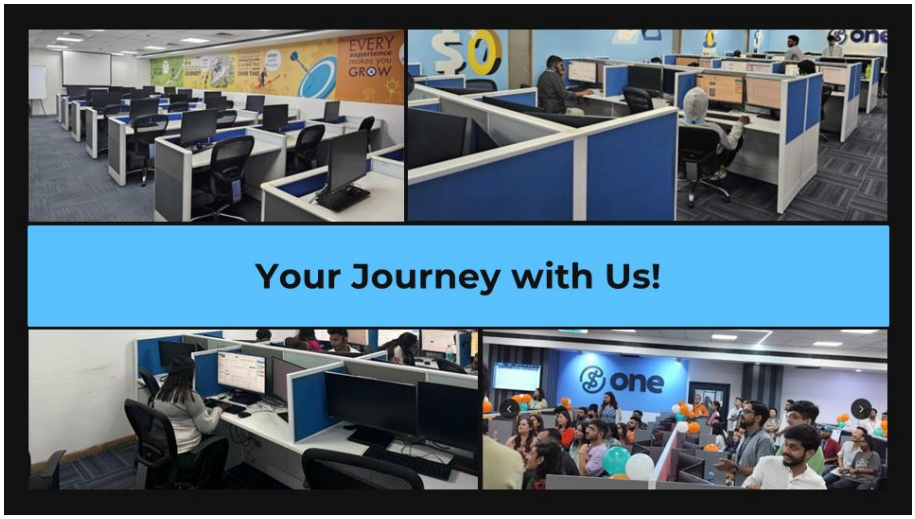
Duration	5 minutes approx.
Slide: 2	
Activity	**Name of Activity:** Making a Positive Chain **Duration:** 5 minutes **Materials Required:** NA **Energizer Steps:** • Have the participants remain seated at their places. • Call on a participant to start the activity. • Ask the participant to give a high five to the next participant and compliment him/her (e.g., "I like your hair!" or "You had great ideas!"). • Ask the participant who receives the compliment to give positive feedback to the next person, along with a high five, and so on, until everyone has both given and received a positive comment. Conduct the energizer activity as per the instructions.
Talking Points	To shake off that lunch slump, let's get moving with an energizer activity.

 Transition	Are you energized? Great, let’s check out what your role as a specialist will be!

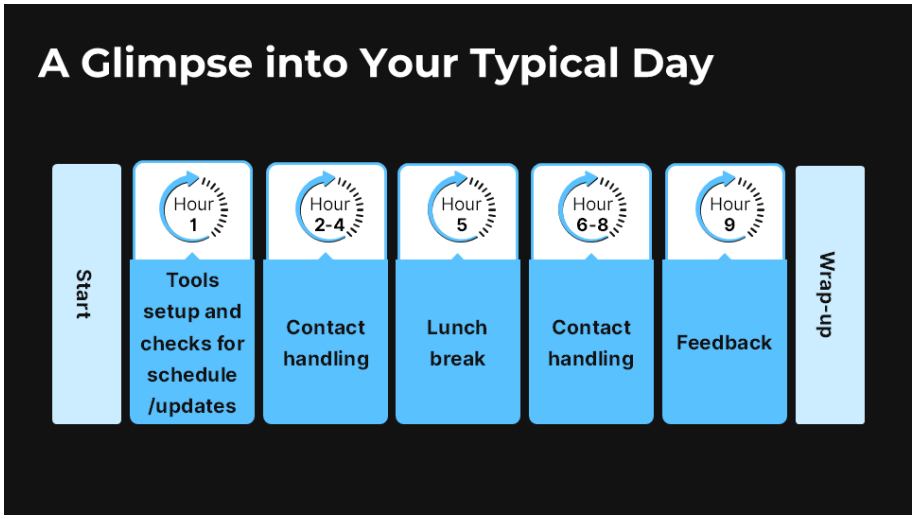
Role of a Specialist

Duration	3 minutes approx.	
Slides: 3 and 4		
Do	Ask a participant to read the quote.	
Talking Points	This quote by Maya Angelou describes the intent of the activity we just conducted. It captures the essence of your work as a specialist. It is not what you say or do but how you make customers feel. And they do like to feel important. As the first point of contact, all your interactions shape the customers' perceptions of our company.	
Transition	You must be curious what your journey with us looks like.	

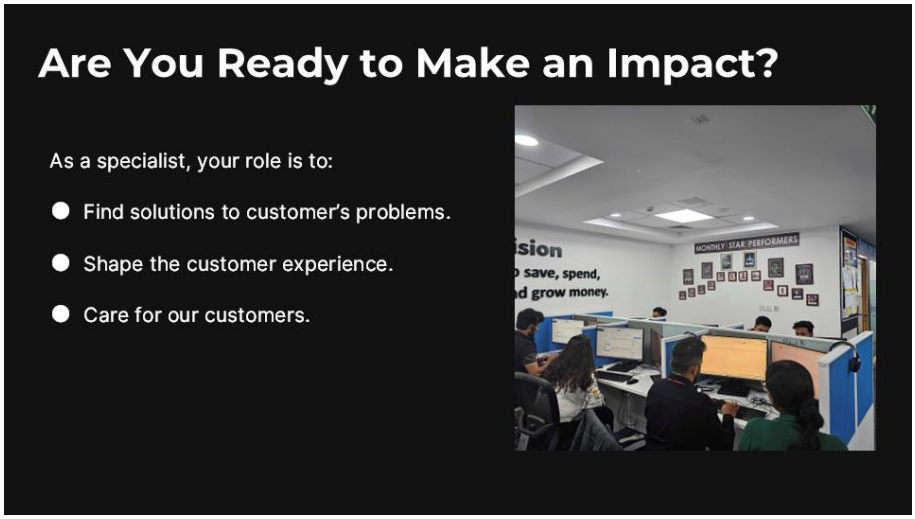
Your Journey with Us!

Duration	1 minute approx.
Slide: 5	
Talking Points	A day in the life of a customer service specialist is filled with challenges and opportunities to make a meaningful impact. From answering questions to solving problems and creating positive experiences, every day brings something new.
Transition	Let's explore what makes this role not just rewarding but exciting and meaningful!

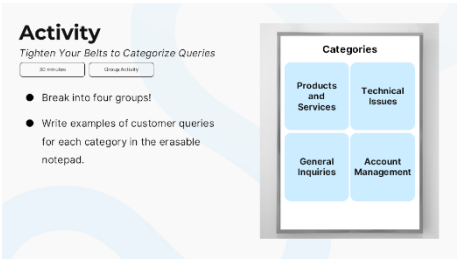
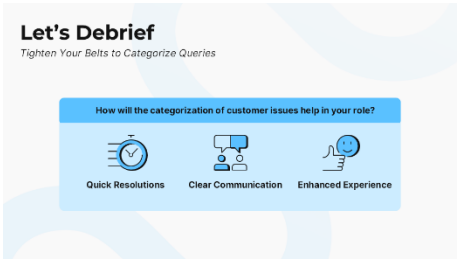
A Glimpse into Your Typical Day

Duration	5 minutes approx.
Slide: 6	
Do	Read the tasks from the slide.
Talking Points	Here is what your workday looks like. Each task is crucial for supporting customers, maintaining our service standards, and ensuring the overall housekeeping of our operations! For your information, a specialist's day includes breaks to recharge energy and maintain focus. You will receive more details about their tasks in the coming days.
Transition	Now that you've seen what your day looks like, let's see how you can make a difference every day.

Are You Ready to Make an Impact?

Duration	2 minutes approx.
Slide: 7	
Talking Points	You're the friendly voice that brightens someone's day. Imagine the impact you can have with every interaction! As a specialist, your role is to solve customer problems, not just answer questions. For example, if a customer is having trouble with a payment, you should identify the issue, guide them through the solution, and ensure its fully resolved. Remember, every interaction shapes how customers feel about us. If a customer is upset or frustrated, staying calm, listening attentively, and showing empathy can turn the experience around, leaving a positive impression. Caring for customers means making them feel valued. For instance, when a customer struggles with an app feature, don't just answer their question, walk them through the steps to ensure they feel fully supported.
Transition	Having understood your role, let's move forward with a group activity to help you develop the mindset of a specialist.

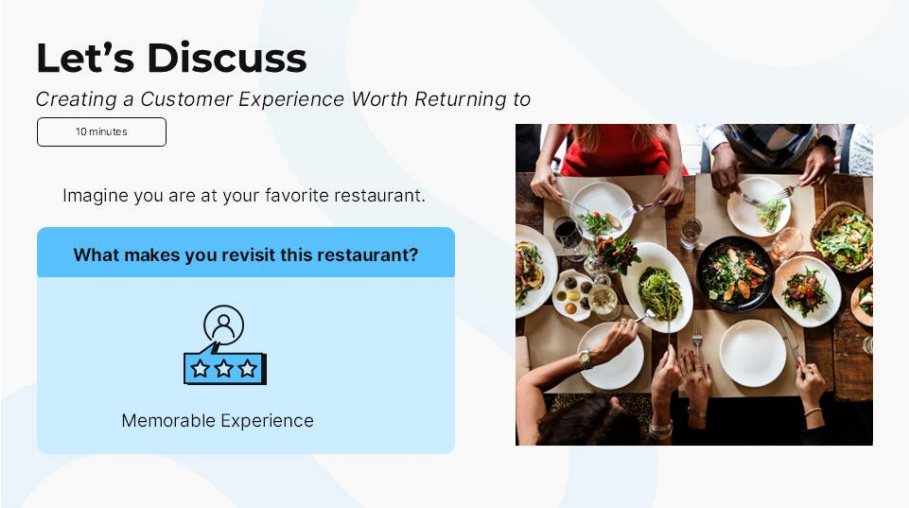
Activity: Tighten Your Belts to Categorize Queries

Duration	30 minutes approx.
Slides: 8 and 9	 
Activity	**Activity Name**: Tighten Your Belts to Categorize Queries Leaderboard Activity: No **Objective**: To identify and categorize the different types of queries customers might have. **Group/Pair/Individual:** Group **Time Required**: 30 minutes (20 minutes for the activity and 10 minutes for a debrief) **Materials Needed**: Erasable notepads, markers, timer **Activity Steps:** **1. Step 1 (5 minutes):** • Form four groups. • Ask each group to reflect on how they would assist customers using the knowledge they've gained so far. • Provide a few categories to help them get started, questions about the app, account issues, technical support needs, or general inquiries. • Give each group an erasable notepad for the activity. **2. Step 2 (15 minutes):** • Encourage each group to brainstorm examples of customer queries they might handle and note them down in the notepad. • Instruct them to create at least one query for each category provided. • Help the participants if they get stuck or are unsure which category an example belongs to.

 Do	Conduct the activity as per the instructions. Move to the next slide for a debrief.
 Talking Points	Up for a challenge! Use your knowledge about our app and our customers from the previous module. Step into your role as a specialist, and through this activity, better understand, anticipate, and categorize customer queries.
 Do (Debrief)	In the slideshow, you will find animated text that will appear with a click action to be used at the appropriate time during the discussion. Be mindful of these clicks when on this slide. Congratulate the groups. Conduct a discussion on how categorization helps streamline responses and create a more personalized experience. Use the probing questions to guide the discussion.
 Ask (Debrief)	**Ask:** How will the categorization of customer issues help in your role? **Probing Questions:** • How does knowing the issue category help you resolve problems faster? (Look for: quicker access to tools, faster problem-solving, using the right tools.) • How does categorizing issues help you prioritize or direct your response during a call? (Look for: faster resolution, increased confidence.) • How does proper categorization improve the customer experience? (Look for: efficiency, building trust, better support.) • What takeaway can you apply to your role as a specialist? (Think about staying organized, making quicker decisions, and communicating more effectively.) ***<In the slideshow, click for the onscreen debrief points to appear.>***

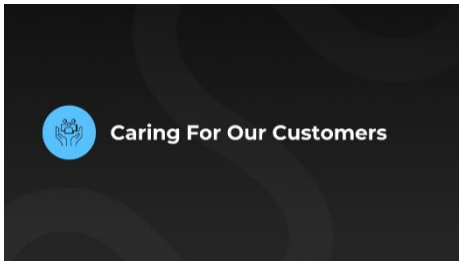
 Talking Points	Categorizing customer issues leads to quicker resolutions and better communication, ultimately enhancing the overall customer experience.
 Transition	Let’s shift our focus to a foundational aspect of your role: caring for our customers.

Let’s Discuss: Creating a Customer Experience Worth Returning to

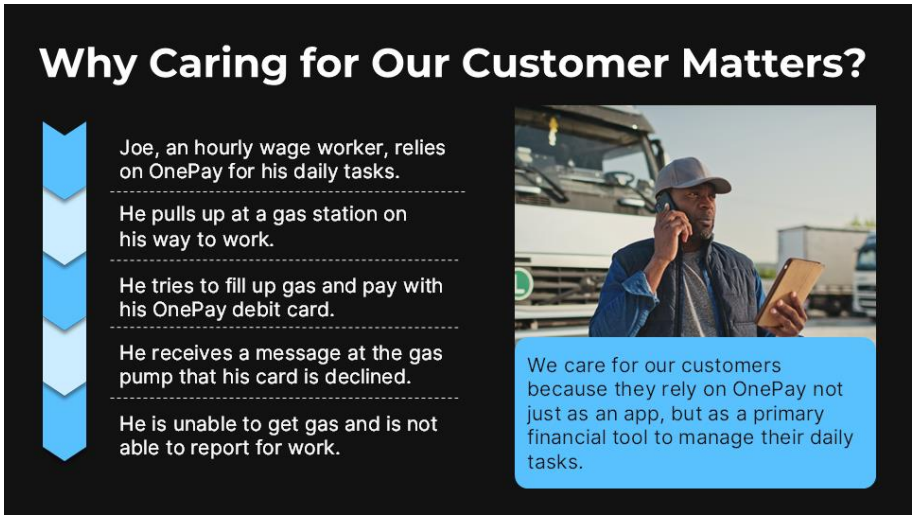
Duration	10 minutes approx.
Slide: 10	
Do	In the slideshow, you will find animated text that will appear with a click action to be used at the appropriate time during the discussion. Be mindful of these clicks when on this slide. Ask the question shown on the slide. Use the probing questions and hints to conduct a discussion on how their experience at the restaurant is a major factor in influencing them to return to it. Use the analogy to highlight how every customer interaction contributes to the overall experience.
Ask	**Ask:** What makes you revisit this restaurant? **Probing Questions:** • What role does the service play in your decision to select a restaurant? How does the staff make you feel valued? (friendly staff, attentive service, personalized experiences, or remembering preferences) • How does the overall experience (from the first greeting to the last goodbye) influence your decision to return? (smooth, enjoyable interactions, feeling appreciated, memorable moments)

	• Think about what you might dislike at a restaurant, maybe poor service or long wait times. How does that impact your decision to return? (frustration, disappointment, lack of trust in the experience)
 Talking Points	To kick off our discussion, let's start with an analogy. Think about your favorite restaurant. You might have experiences that draw you to this restaurant. ***<Ask the questions and solicit responses.>*** ***<In the slideshow, click for the answer to appear.>*** Just like your favorite restaurant, you should also aim to create a memorable experience for our customers when they are using our app or talking to our specialists. It's not just about "taking care" of the customer; it's about designing an experience that's easy, consistent, and personal.
 Transition	Now, we'll talk about how you can deliver that same level of care and create the best experience for our customer.

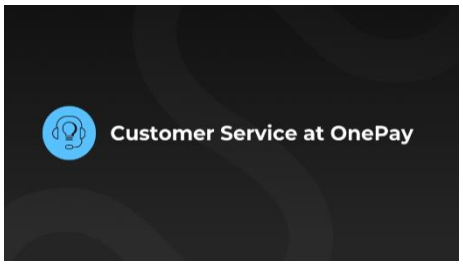
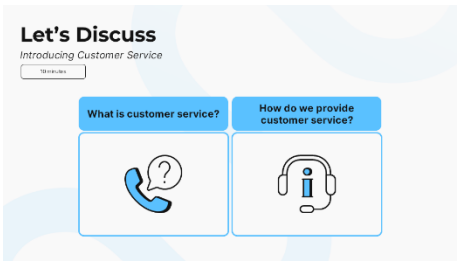
How Do We Care for Our Customers?

Duration	2 minutes approx.
Slides: 11 and 12	 
Talking Points	As a specialist, you're not just on the phone or in a chat. You're the friendly voice or message that shows customers you care, adding a human touch to every interaction. You need to focus on treating customers like valued guests. Think of every customer as a guest in your home, how you welcome the guests and make them feel respected. Being a digital product, we lack in-person interaction, and customers have no physical store to visit. As specialists, you are their only direct human connection, making every interaction crucial. You need to build trust in every interaction by listening actively, showing empathy, and creating a lasting positive impression. Don't forget that our customers are primarily underbanked or unbanked individuals who frequently shop at Walmart, and through our partnership, we provide accessible financial solutions while ensuring their needs are met with attention and respect. It is important that we must offer a personal experience irrespective of the interaction through phone, chat, or email, ensuring customers feel valued in every interaction.
Transition	We'll check out how you can make meaningful connections in every interaction.

Why Caring for Our Customer Matters?

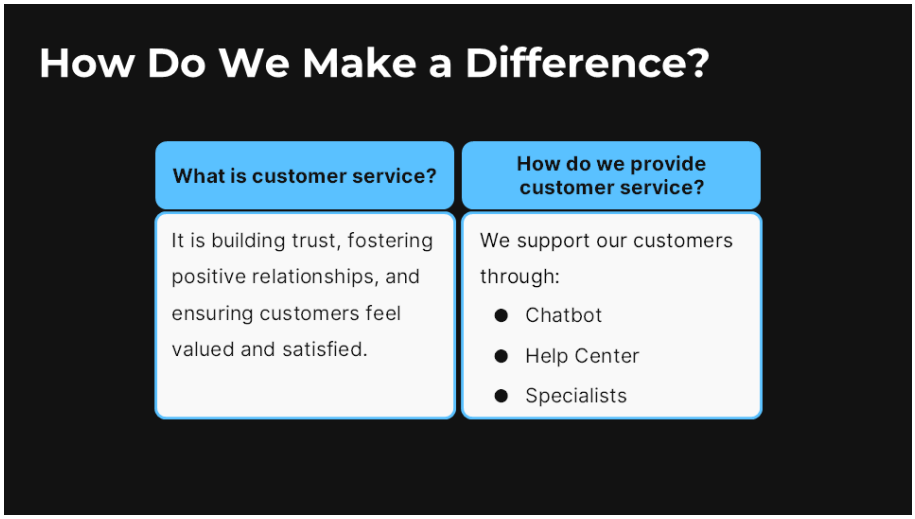
Duration	3 minutes approx.
Slide: 13	
Do	Read the example from the slide. In the slideshow, you will find animated text that will appear with a click action to be used at the appropriate time during the discussion. Be mindful of these clicks when on the slide.
Talking Points	Joe is an hourly wage worker, who relies on OnePay. It is his only source of funds. He doesn't have any other bank account or credit/debit cards. ***<In the slideshow, click for the onscreen point to appear.>*** Our customers, like Joe, rely on OnePay not as a convenience but as their primary financial tool to manage everyday tasks. Our product directly impacts the ability of our customers to work and take care of their families. It's essential to recognize how this ties into our role of caring for them, ensuring that we are providing the support they need to manage their financial tasks and improve their lives.
Transition	In this example, we've highlighted why caring for our customers is essential. Next, we'll explore how you can turn this care into meaningful action.

Let’s Discuss: Introducing Customer Service

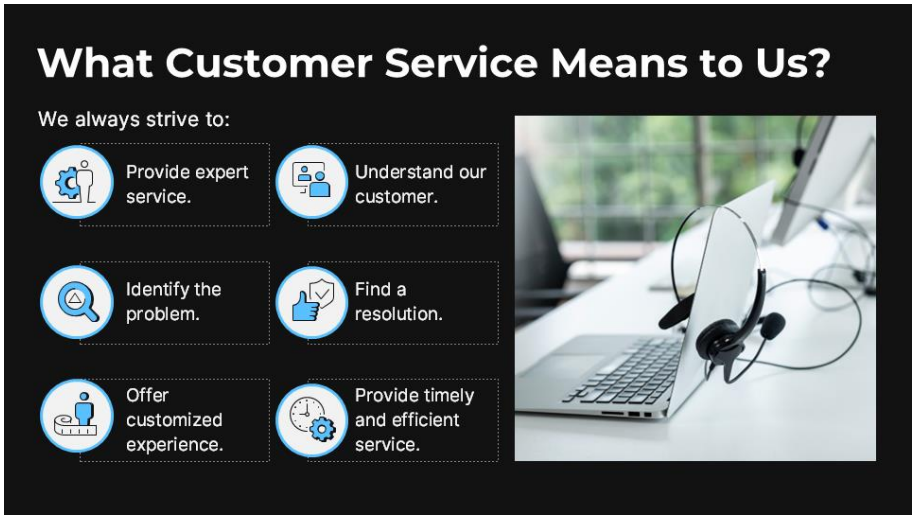
Duration	10 minutes approx.
Slides: 14 and 15	 
Do	Use the probing questions to conduct a discussion on what customer service means and how it’s done at OnePay using the questions on slide and the probing questions. Move to the next slide for the answers.
Talking Points	As specialists, customer service is your superpower. Let's discuss what this superpower truly means and how you can use it effectively.
Ask	**Ask:** • What is customer service? • How do we provide customer service? **Probing Questions:** • What does "customer service" mean to you? (Think about the core purpose of customer service like helping, solving problems, and supporting customers.) • How would you describe a "good" customer service experience? (Look for responses like quick resolution, friendly attitude, and clear communication.) • How does OnePay deliver customer service, especially when it’s a digital product? (Focus on channels like phone, chat, email,

	app.) • What skills or attitudes are most important for delivering great customer service in your role? (Look for responses like patience, problem-solving, listening, communication, and empathy.)
 Transition	That was a great discussion on customer service. Now, let’s find out what it means and how we provide customer service.

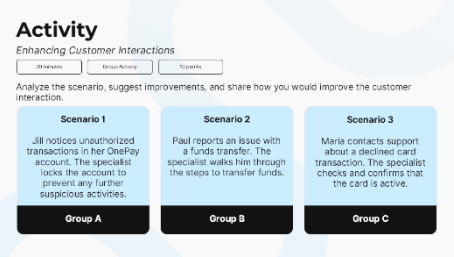
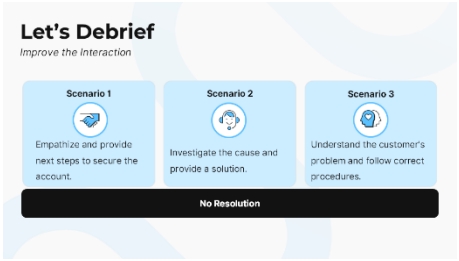
How Do We Make a Difference?

Duration	2 minutes approx.
Slide: 16	
Talking Points	Customer service is about building long-term relationships by connecting with customers, understanding their needs, supporting them, and delivering solutions that make them feel valued and satisfied. At OnePay, we prioritize delivering outstanding service, whether it's through our specialists, Help Center, or chatbots. A chatbot is an automated tool within the app that answers customer queries instantly.
Transition	Now that you understand what customer service is, let's discover what makes our customer service stand out.

What Customer Service Means to Us?

Duration	2 minutes approx.
Slide: 17	
Do	Ask a few participants to read out the points from the slide.
Talking Points	We offer a customized, timely, and efficient customer experience that goes far beyond traditional telephone support. We strive to understand the concerns of the customer and avoid making assumptions. Our specialists offer personalized experiences by providing clear, specific answers rather than vague or general responses.
Transition	We'll put your knowledge of the key elements of customer service into practice with an activity.

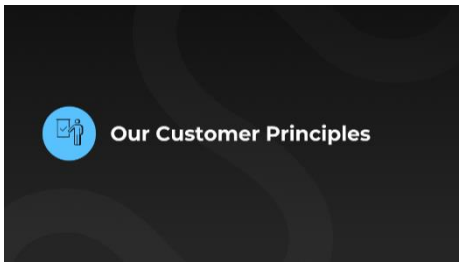
Activity: Enhancing Customer Interactions

Duration	30 minutes approx.
Slides: 18 and 19	 
Activity	**Activity Name**: Spot the Gaps in Service **Leaderboard Activity:** No **Points:** NA **Objective**: To analyze customer service scenarios and come up with suggestions on how to handle the situation more effectively, improving the overall customer experience. **Group/Pair/Individual:** Group **Time Required**: 30 minutes (20 minutes for the activity and 10 minutes for a debrief) **Materials Needed:** Timer and erasable notepads **Activity Steps:** **1. Step 1 (1 minute):** • Inform the participants that this is a leaderboard activity. • Form three teams. • Assign each team a scenario as shown on the slide. • Provide an erasable notepad to each group. • Instruct each team to carefully read through their assigned scenario. **2. Step 2 (10 minutes):** • Ask each team to discuss the scenario and identify whether the customer's issue was resolved. • Have the team suggest how they would handle the scenario differently, focusing on ways to improve the interaction and enhance the customer experience. • Encourage teams to take notes on their notepad.

	• Allow 10 minutes for this activity. **3. Step 3 (9 minutes):** • Invite a participant from each team to share their scenario and the suggestions they came up with for handling the situation better. • Keep in mind that since this is the first day of training and there is no pre-assessment, this activity is intended to provide a brief overview of participants' current understanding of customer service. • Use this to gauge their initial knowledge, rather than expecting fully refined responses.
 Do	Conduct the activity as per the instructions. Move to the next slide for a debrief.
 Talking Points	In this activity, you'll analyze customer interaction scenarios and identify the gaps in customer service. Get ready to sharpen your skills and make a meaningful difference!
 Do (Debrief)	For the debrief discussion, focus on these gaps: • For all the scenarios, the customer issue was not resolved. • Scenario 1: Specialist should be empathetic and acknowledge Jill's frustration, offer a clear resolution to the problem (unauthorized transaction), and explain the next steps to secure her account. • Scenario 2: The specialist should probe to identify the root cause of the issue (e.g., insufficient funds, transfer type, merchant issue, errors preventing the transfer). They should investigate the cause, provide a workaround, and follow up to ensure a resolution. • Scenario 3: They should first understand the customer's issue and show empathy by reassuring the customer. They should use the correct procedures to resolve the issue and provide timely support. Encourage the participants to think about how they will handle such scenarios in their work.

 Talking Points	Please note that there is a common thread in these scenarios which is the lack of resolution. Great job with suggestions. You're on track to improving your skills.
 Transition	Let's next look into the customer principles that will help you enhance your interactions.

Putting Customers First

Duration	2 minutes approx.	
Slides: 20 and 21		
Do	Read the customer principles from the slide.	
Talking Points	Customers are at the heart of everything we do. That's why we have the customer principles. These principles are your guide to putting customers first, helping you create amazing experiences with every interaction! These principles help us consistently deliver the best service to our customers as follows: • At OnePay, we aim to make managing money fun and engaging, in contrast to traditional banking, which is often a frustrating experience due to confusing terms, unfriendly interfaces, and poor customer service. Our app is user-friendly, and we provide cash back rewards, savings milestones, and improved credit scores. • We want our customers to regularly engage in our app. • We provide bonuses, cash back, and other opportunities to help our customers save. • We aim to make it effortless for our customers to access funds and maximize the value they get from our app. • In this process, you play a crucial role by providing guidance and ensuring that customers can fully leverage the app's features.	

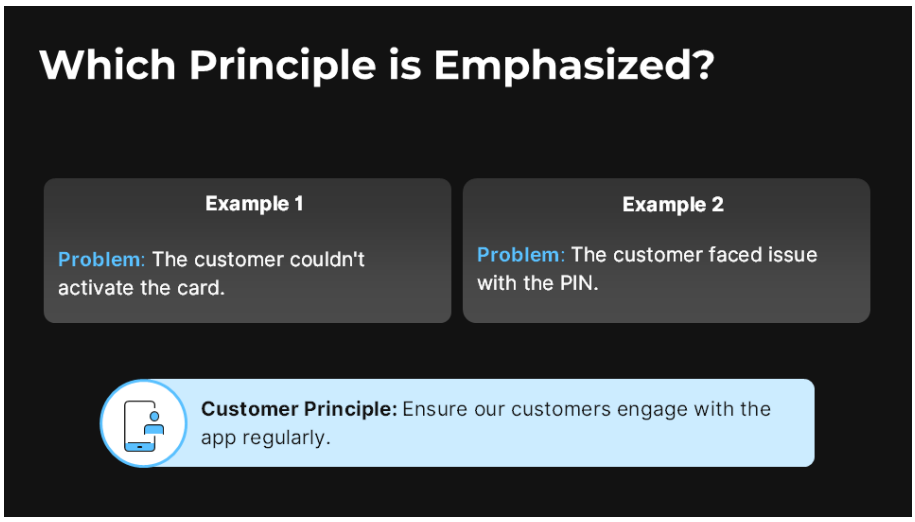
 Transition	We'll look at some examples to demonstrate how you can apply these principles in real interactions.

Tune in and Spot the Principles

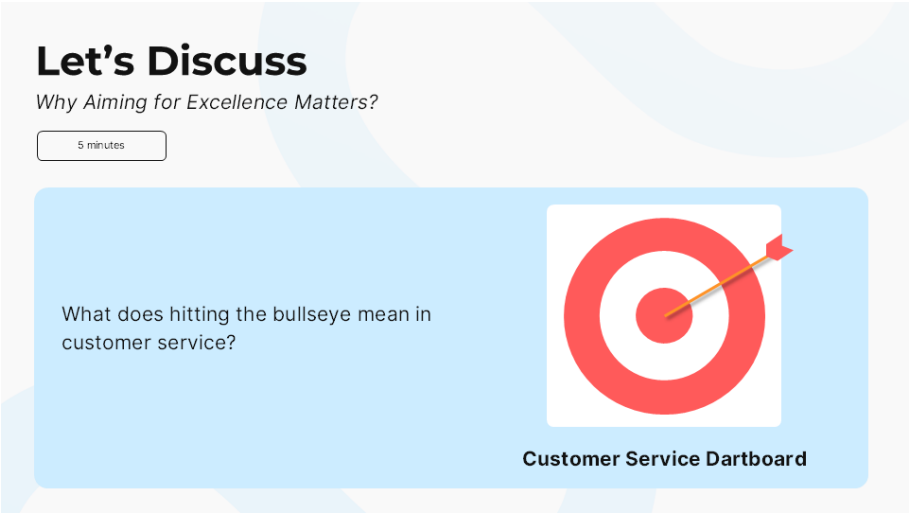
Duration	6 minutes approx.
Slide: 22	
Do	• Play both the audios. • Ask the questions on the slide. • Use these probing questions to guide the participants. • Move to the next slide to display the answers.
Talking Points	Let’s listen to two customer interaction examples and see if you can spot the servicing principles.
Ask	**Ask:** • Do you think the specialist followed the customer principles in these examples? • If yes, which customer principle did the specialist follow? **Probing Questions:** • What was the customer's main concern in each call? (Identify the customer's issues related to managing money, card activation, or PIN.) • How did the specialist handle the customer’s issue, and did they

	make it easy for the customer? (Guide the participants to assess if the specialist provided a simple, accessible solution in line with making the app user-friendly.) • How did the specialist ensure the customer felt comfortable using the app or service? (Focus on how the specialist made the experience effortless and encouraged continued engagement with the app.) • What could the specialist have done differently to make the customer's experience more enjoyable or seamless? (Helps the participants consider how they could enhance the customer experience.) **Expected Responses:** • Question 1: Card activation issue in Example 1, PIN issues in Example 2 • Question 2: Yes • Question 3: Ensure our customers engage with the app regularly

Which Principle is Emphasized?

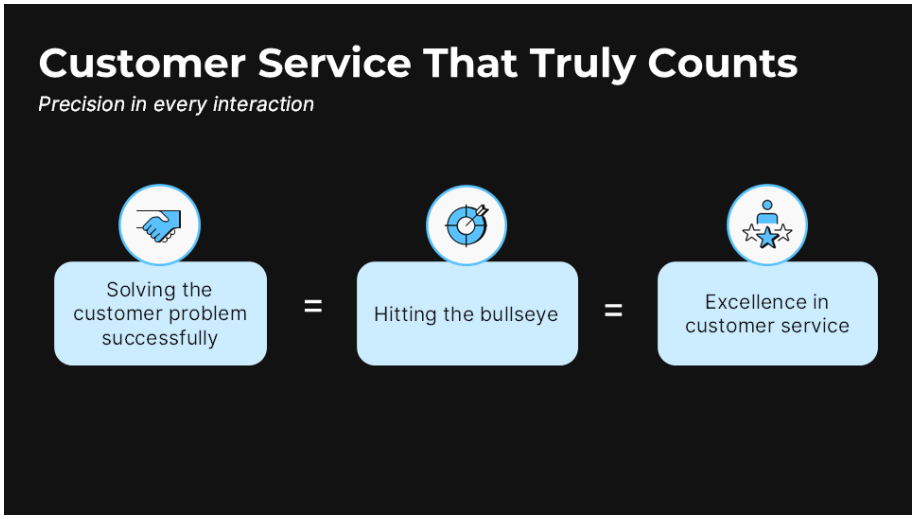
Duration	2 minutes approx.
Slide: 23	
Talking Points	In the first example, the customer faces issues with card activation, and in the second example, the customer faces issues with the PIN.
Do	Ask a participant to read the customer principle.
Transition	These examples reflect our commitment to service. You can hit the bullseye in customer service by applying our customer principles in your everyday interactions.

Let's Discuss: Why Aiming for Excellence Matters?

Duration	5 minutes approx.
Slide: 24	
Do	Conduct a discussion using the bullseye analogy to relate it to customer service and a specialist's role. Encourage responses from the group.
Talking Points	Imagine you're standing at a dartboard, ready to throw your dart. ***<Ask the questions and solicit responses from the participants.>*** Each time you engage with a customer, think of it as your chance to hit the bullseye. Strive for excellence in every interaction. This is your moment to make a meaningful impact and deliver exceptional service.
Ask	What does hitting the bullseye mean in customer service? What will be your target: the outer rings, the inner rings, or the bullseye? And why? What does hitting the bullseye represent in terms of your role as a customer service specialist? What will be your target when helping customers?

	Expected Response: Bullseye, because it represents hitting the mark, achieving precision, and delivering excellence.

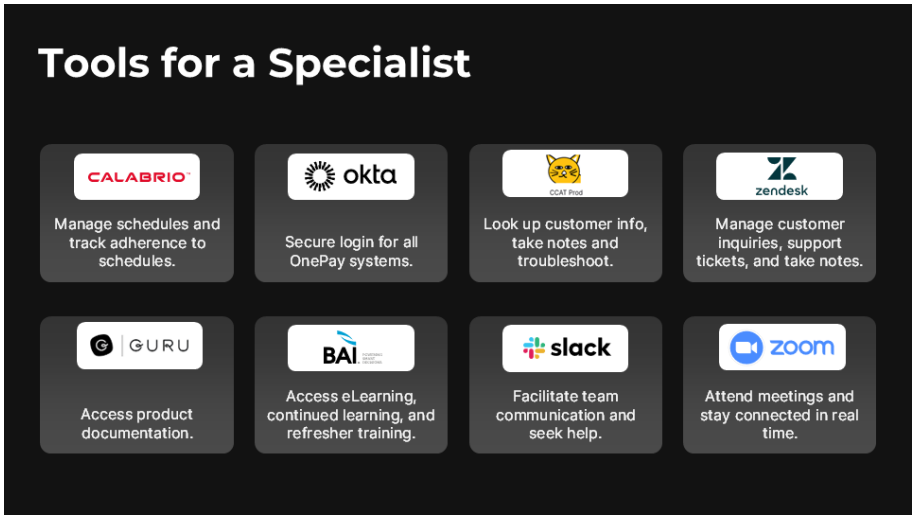
Customer Service That Truly Counts

Duration	2 minutes approx.
Slide: 25	
Talking Points	Just like in darts, getting close is adequate in customer service, but hitting the bullseye is what truly matters. The bullseye symbolizes excellence, precision, and focus, just like delivering exceptional customer service. Providing excellent customer service requires you to address issues with precision. You can achieve this by asking probing questions to uncover the root cause of the problem, ensuring a clear understanding before offering an effective solution.
Transition	We'll focus on your role in delivering that excellence.

Responsibilities of a Specialist

Duration	3 minutes approx.
Slides: 26 and 27	 
Talking Points	You will learn about your role in more detail in the upcoming days. You've already learned how to treat customers as guests. OnePay is committed to support, transparency, and providing a positive experience in your communication. Avoid jargon and make sure your explanations are simple, clear, and easy to understand. Help customers feel confident in navigating the app and using its features independently. Address customer issues quickly, while ensuring your solutions are accurate and effective. Stay proactive in learning new tools, updates, and customer service techniques to continuously improve your skills.
Transition	To fulfil your roles and responsibilities, you will need some tools. Let's know about these tools.

Tools for a Specialist

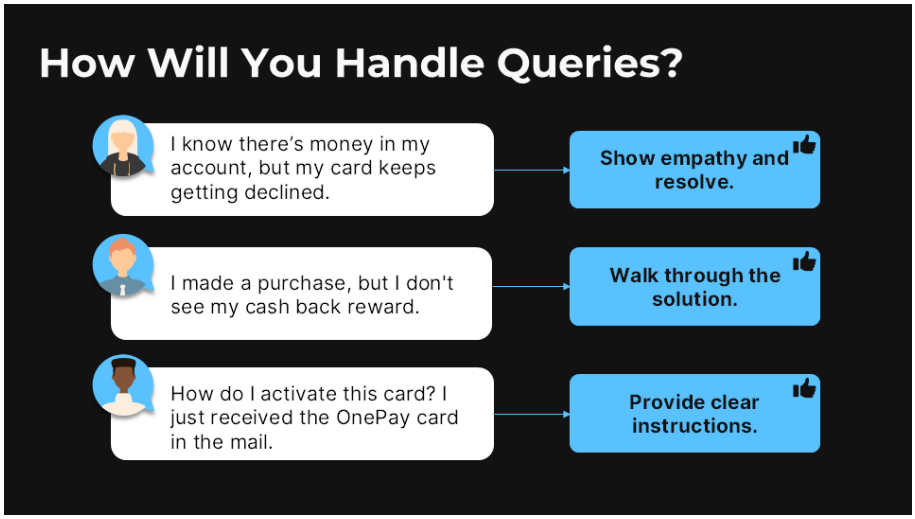
Duration	3 minutes approx.
Slide: 28	
Talking Points	As a specialist, you have access to various tools used at OnePay. These are the front-office customer tools used to serve live customer contacts. Remember that there may be other tools that back-office teams use. You will use Calabrio for managing schedules. With Okta, you can access all our systems and tools. CCAT is a tool that helps you manage customer calls and chats, provides customer information, and also helps you troubleshoot. You will use Zendesk to manage customer inquiries, support tickets, and take wrap-up notes. Imagine having all the product information at your fingertips. That's Guru! Just like the word “Guru,” which signifies a guide or teacher, this tool will provide you with all the product information. After logging into Okta, you can access BAI to complete compliance training and track your performance. You have to use Slack for team communication, while Zoom helps with virtual meetings and staying connected. Let me remind you that these tools are designed to enhance your skills and support you in delivering excellent service. We will explore these tools in the coming days.

 Transition	Now that you have a brief idea of your role and the tools you'll be using, you’re ready to connect with the customers. Here are some best practices to help you.

How to Win with Every Interaction

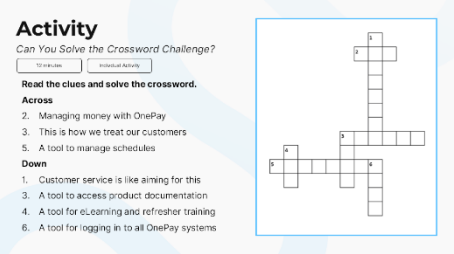
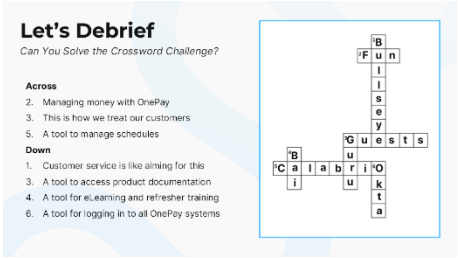
Duration	2 minutes approx.
Slide: 29	
Talking Points	To enhance your efficiency and effectiveness as a specialist, you need to follow some best practices. As you learn these best practices, remember that every customer interaction is an opportunity to hit the bullseye. By applying what you've learned, active listening, clear communication, and problem-solving, you can make a meaningful impact and deliver exceptional service every time. Keep striving for excellence with every conversation, aiming for the highest standard in everything you do.
Transition	Knowing your responsibilities will help you put these practices into action and make a real difference in every customer interaction! Let's look at some examples of support you may encounter in your day-to-day work.

How Will You Handle Queries?

Duration	10 minutes approx.
Slide: 30	
Do	In the slideshow, you will find animated text that will appear with a click action to be used at the appropriate time during the discussion. Be mindful of these clicks when on this slide.
Talking Points	Here are some customer queries you'll encounter.
Ask	How would you handle these situations? Solicit responses for each scenario and discuss how they should handle customer concern using these strategies: • Scenario 1: Acknowledge the customer's frustration with empathy, then explain the possible reasons for the decline (insufficient funds or a security block). Guide them through steps to resolve the issue. • Scenario 2: Walk the customer through the steps to send money. Make sure they feel confident and empowered to complete the transaction on their own.

	• Scenario 3: Provide clear step-by-step instructions on how to transfer funds between accounts. Address any concerns with empathy. ***<In the slideshow, click for the onscreen text to appear for each scenario.>***
 Transition	Time to reinforce what you've learned in this module with a fun activity.

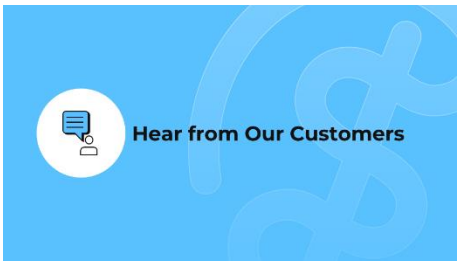
Activity: Can You Solve the Crossword Challenge?

Duration	12 minutes approx.
Slides: 31 and 32	 
Activity	**Activity Name**: Can You Solve the Crossword Challenge? **Leaderboard Activity:** No **Objective:** To solve a crossword based on the clues related to a specialist's role. **Group/Pair/Individual:** Individual **Time Required:** 12 minutes (8 minutes for activity and 4 minutes to discuss the answers) **Materials Needed:** Erasable notepad, markers, timer **Activity Steps:** **1. Step 1 (3 minutes):** • Provide an erasable notepad and marker to each participant. **2. Step 2 (5 minutes):** • Instruct participants to carefully read the across and down clues. • Ask them to write the correct answer for each clue in their notepad. (Example: A2 for 2 Across or D1 for 1 Down) • Give them 5 minutes to complete this activity.
Talking Points	It's time for a fun challenge! Let's put your knowledge to the test with a quick crossword.

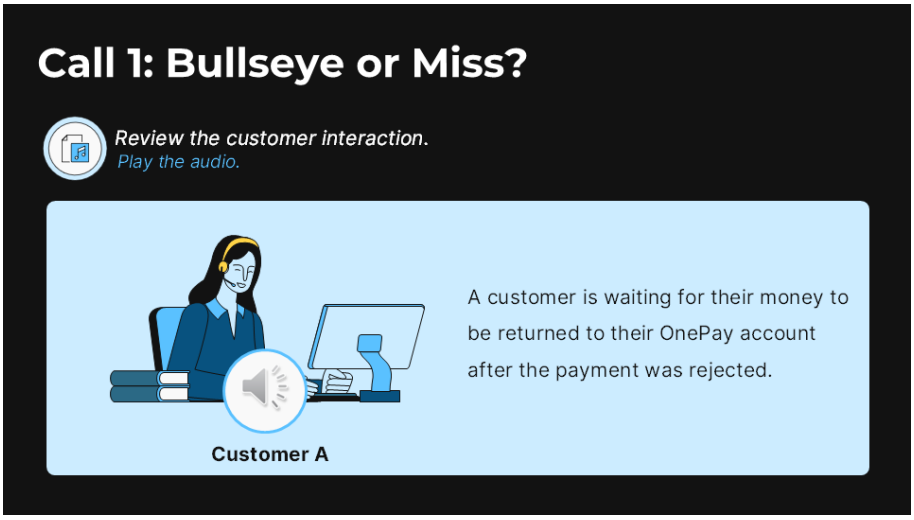
 Do	• Conduct the activity as per the instructions. • Move to the next slide for answers. • Ask the participants to check their answers. • Discuss and resolve their queries.
 Transition	That's a wrap! In the next module, “Hear from Our Customers,” you’ll analyze real customer interactions and brainstorm ways to improve their experience.

Module 5: Hear from Our Customers

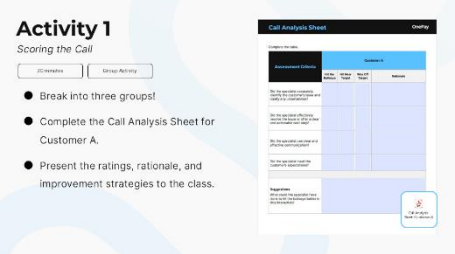
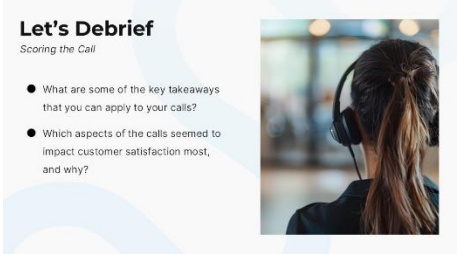
Day 1: Agenda

Duration	1 minute approx.
Slides: 1 and 2	 
Talking Points	In the previous module, we learned how important your role is in delivering great customer service. Now, let's hear directly from the people you're here to help, our customers.

Call 1: Bullseye or Miss?

Duration	3 minutes approx.
Slide: 3	
Talking Points	As specialists, your goal isn't just to interact with the customer but to hit the bullseye of customer satisfaction. For the next activity, "Scoring the Call," listen to real customer calls, and assess how close the specialists came to hitting the bullseye. You will review a call and see firsthand where the specialist aimed, whether the specialist hit the mark, and what can be improved to ensure you always reach the bullseye. Before you proceed to the activity, listen to this call, which we'll refer to as Customer A. As you review the interaction, pay attention to the customer's emotions, concerns, and needs.
Do	Play Customer A audio. Check and increase the volume, if needed. Move to the next slide for the activity.

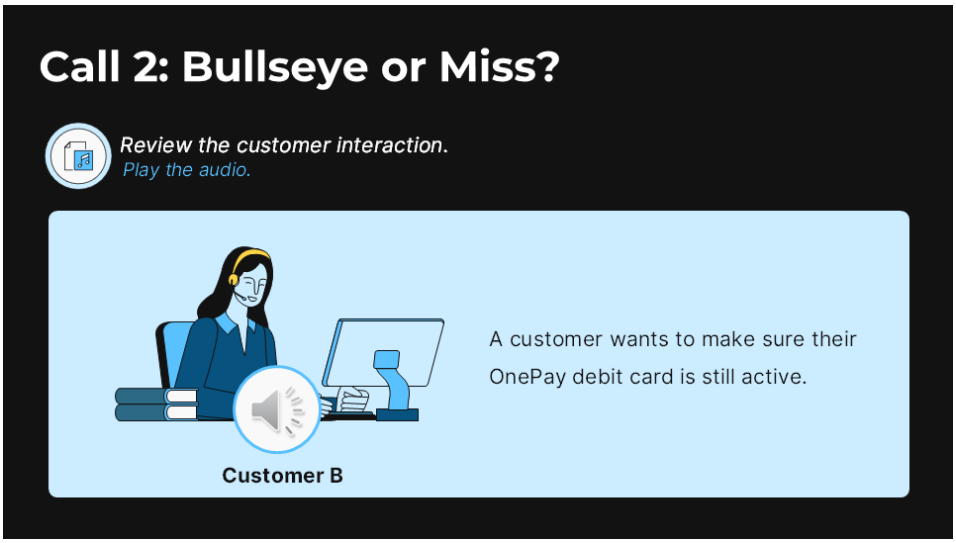
Activity 1: Scoring the Call

Duration	20 minutes approx.
Slides: 4 and 5	 
Activity	**Activity Name:** Scoring the Call **Leaderboard Activity:** No **Points:** NA **Objective:** To analyze and assess customer interaction chats. **Group/Individual/Teams:** Group **Time Required:** 20 minutes (15 minutes for the activity and 5 minutes for a debrief and key takeaways) **Materials Needed:** Whiteboard, timer, and Call Analysis Sheet (*M5_OnePay_NHT_Day1_Activity_Call Analysis Sheet_CustomerA.pdf*) **Activity Steps:** **1. Step 1 (1 minute):** • Explain the purpose of the activity. • Form three groups. **2. Step 2 (8 minutes):** • Each group will open the Call Analysis Sheet for Customer A on Ask each group to open the Call Analysis Sheet for Customer A on their desktop and complete it. This is an editable PDF. A sample of the sheet is shown on the slide. • Help them with the editable PDF if they are stuck. • Explain the various rating parameters used to rate calls like bullseye, near target, or off target. • Each group will provide a rationale for their rating and suggest improvements.

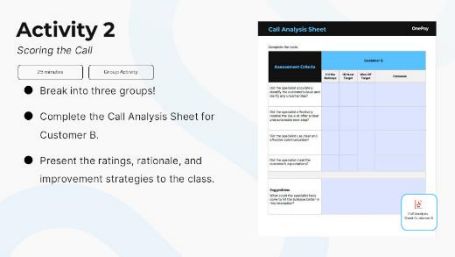
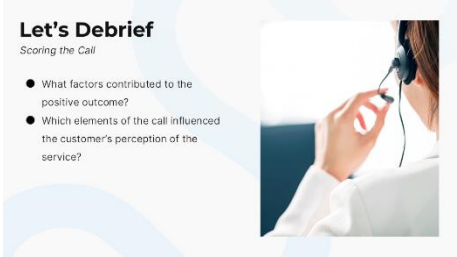
	3. Step 3 (6 minutes): • Invite a participant from each group to present their analysis sheet.
 Do	Guide each group to open *M5_OnePay_NHT_Day1_Activity_Call Analysis Sheet_CustomerA.pdf*. Ask them to fill up the sheet. Conduct the activity as per the instructions. Move to the next slide for a debrief.
 Talking Points	You've already heard the chat for Customer A. Now fill out the Call Analysis Sheet.
 Do (Debrief)	Conduct a discussion analyzing the responses of each team. Use the probing questions to lead/stimulate the discussion.
 Talking Points (Debrief)	Thank you for your insights. Now, let's break down what we've heard and look for patterns and actionable takeaways.
 Ask (Debrief)	**Ask:** • What are some of the key takeaways that you can apply to your calls? • Which aspects of the calls seemed to impact customer satisfaction most, and why? **Probing Questions:** • What were the recurring issues, customer concerns, or specialist behaviors that stood out? (tone, language, response times, the customer expressing their thoughts, or the specialist's handling

	of the situation) • What could you learn from this call and apply in your interactions? (Did the specialist do something effectively, like using empathy or clarifying questions?) • Which moments in the call had the biggest impact on the customer's experience? • How did the specialist's tone, problem-solving skills, or the way they addressed the customer's concerns influence satisfaction?
 Transition	Nice work on the first call! Now, let's jump into the next one and see what we can learn.

Call 2: Bullseye or Miss?

Duration	6 minutes approx.
Slide: 6	
Talking Points	Let's listen to another call and do a similar analysis. This time, focus on different aspects that may stand out, like how the specialist handles the customer's emotions, resolves issues, or manages the flow of the conversation.
Do	Play Customer B audio. Check and increase the volume, if needed. Move to the next slide for the activity.

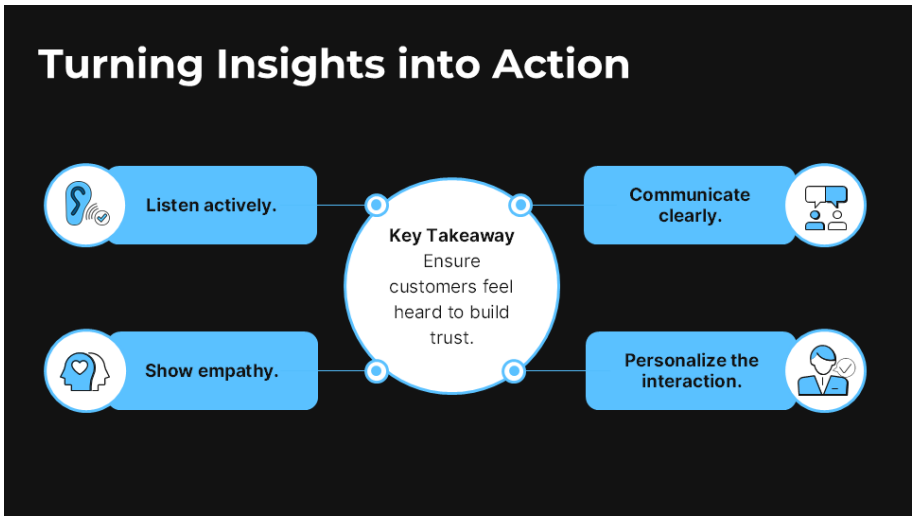
Activity 2: Scoring the call

Duration	25 minutes approx.
Slides: 7 and 8	 
Talking Points	Fill out the Call Analysis Sheet for Customer B.
Activity	**Activity Name**: Scoring the Call **Leaderboard Activity:** No Points: NA **Objective**: To analyze and assess customer interaction chats. **Group/Individual/Teams:** Group **Time Required**: 25 minutes (20 minutes for the activity and 5 minutes for a debrief) **Materials Needed**: Whiteboard, timer, and Call Analysis Sheet (*M5_OnePay_NHT_Day1_Activity_Call Analysis Sheet_CustomerB.pdf*) **Activity Steps:** **1. Step 1 (9 minutes):** • Shuffle the groups from the previous activity to encourage fresh perspectives and collaboration. • Ask each group to open the Call Analysis Sheet for Customer B on their desktop and complete the sheet. The PDF is editable. **2. Step 2 (6 minutes):** • Invite a participant from each group to present their analysis

	sheet.
 Do	Guide each group to open *M5_OnePay_NHT_Day1_Activity_Call Analysis Sheet_CustomerB.pdf*. Conduct the activity as per the instructions. Move to the next slide for a debrief.
 Talking Points (Debrief)	This call shows what a positive interaction looks like. Let's discuss your analysis.
 Do (Debrief)	Conduct a discussion analyzing the responses of each group. Use the probing questions to lead/stimulate the discussion.
 Ask (Debrief)	**Ask:** • What factors contributed to the positive outcome? • Which elements of the call influenced the customer's perception of the service? **Probing Questions:** • What specifically made the experience a positive one? (Was it the speed of service, the attitude of the specialist, or something else?) • How did the specialist communicate with the customer? (What tone, words, or actions made the communication effective?) • How did the specialist personalize the experience? (Did they use the customer's name, or cater to their specific needs?) • How did the customer perceive the service? Why? (clear communication, the specialist's empathy, any specific actions or words from the specialist that made a strong impact on the customer's view) • What would you have done differently? (Would you have handled the situation the same way, or tried a different approach?)

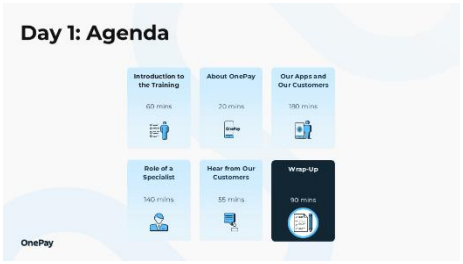
 Transition	Now that we've discussed your analysis of the calls, let’s talk about the takeaways.

Turning Insights into Action

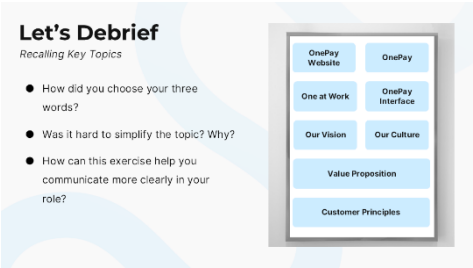
Duration	2 minutes approx.
Slide: 9	
Talking Points	Before we dive into the debrief, remember that each customer interaction is your chance to hit the bullseye. It's not just about resolving the issue, but also about making the customer feel heard and valued in addition to resolving the issue. Now, let's discuss how you can apply this in your calls. It is important to listen actively and communicate clearly to avoid confusion. We should: • Show empathy to build rapport with the customers and earn their trust. • Personalize the interaction to make it feel more genuine and less robotic. • Have a positive tone that enhances the customer experience • Resolve the problem efficiently to keep things moving smoothly. We will learn more about these topics in the upcoming days of the training. However, you need to take these insights into your calls.
Transition	It's important to apply these insights to your calls. We will explore them in more detail during the upcoming days of training. That's a wrap on this module! Let's now bring together all that you've learned today in the next module.

Module 6: Wrap-Up

Day 1: Agenda

Duration	1 minute approx.	
Slides: 1 and 2		
Talking Points	We’re almost done with Day 1! Before we wrap up, this final module has an activity, a quick quiz, and a sneak peek at what’s coming next. Let’s finish strong!	

Activity: Recalling Key Topics

Duration	40 minutes approx.
Slides: 3 and 4	 
Activity	**Activity Name**: Recall Key Topics **Leaderboard Activity:** No **Objective**: To reflect on and summarize key topics from the training. **Group/Individual/Pair:** Group **Time Required**: 40 minutes (30 minutes for the activity and 10 minutes for a debrief) **Materials Needed**: A tick-tock timer **Activity Steps:** **1. Step 1 (2 minutes):** • Form four groups. • Inform the participants that the objective of the activity is come up with a three-word summary for the topics listed on the slide. For example, a summary of the NHT training in three words could be "Empower, Engage, Excel." **2. Step 2 (28 minutes):** • Assign a topic from the slide to the first group. List of topics with summary words: 1. OnePay Website (Help Center, Resources, Information, Troubleshoot) 2. OnePay (Save, Spend, Borrow, Monitor, Manage) 3. OnePay at Work (Save, Budget, Track, Instapay) 4. Customer Principles (Fun, Engage, Earn, Maximize, Save) 5. Our Vision (Save, Spend, Borrow, Grow)

	6. Our Culture (Customer-led, Scrappy, Humble, Honest, Hungry, Prioritizers) 7. OnePay Interface (Home, Pay, OnePay Wallet, Discover, Profile, Cash Control) 8. Value Proposition (Simple, Benefits, Rewards, Deals)) • At the end of 90 seconds, the group announces their summary out loud to the class. • If the group is unable to answer within the time limit, the topic passes to the entire class. • The participants who come up with the summary should raise their hands. • Select a participant who raised their hand to present the summary to conclude the activity for that round. • The activity continues with the next group until all the topics have been used. • This activity fosters a lot of synergy in the class as it encourages teamwork, active participation, and quick thinking.
 Do	Conduct the activity as per the instructions. Move to the next slide for a debrief.
 Talking Points	We're going to do a fun activity to recap the key topics you've covered so far.
 Do (Debrief)	Encourage a few participants to share their reflections on the questions listed on the slide. Use the probing questions and hints to guide them.
 Ask	**Ask:** • How did you choose your three words? • Was it hard to simplify the topic? Why? • How can this exercise help you communicate more clearly in your role?

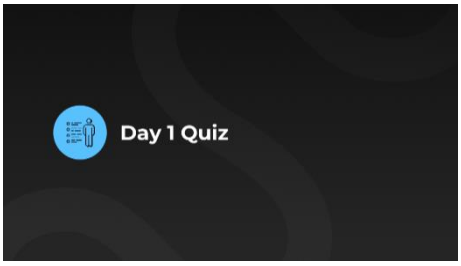
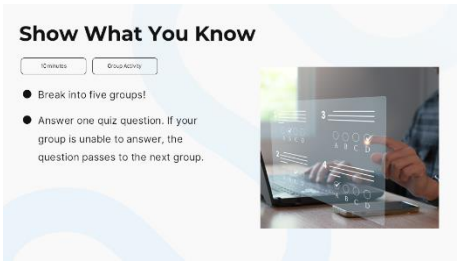
(Debrief)	**Probing Questions:** • How did you decide on the three words for your topic? (Reflect on the decision-making process and the key points they identified.) • Was it challenging to condense the topic into just three words? Why or why not? (Discuss the difficulty of simplification and what they prioritized.) • What did you learn about your topic by having to narrow it down to three key words? (Reflect on the deeper understanding they gained from simplifying their topic.) • Do you agree with the other group's summary? (How different perspectives can lead to varied interpretations of the same topic.) • How can this exercise help you when summarizing complex information in your role? (Importance of concise communication.)
 Say (Debreif)	Great job, everyone! Let's take a moment to review. These summaries capture the essence of the topics we've covered, and they'll serve as a reminder of what's important moving forward. We will learn more about these topics in the next few days.
 Transition	Now that you've reflected on the key topics, let's talk about how you can maximize your training experience.

Making the Most of Training

Duration	15 minutes approx.
Slide: 5	
Do	Call out the participants one by one to read a point from the slide and then discuss why they are important.
Talking Points	The way you engage and participate will have a big impact on how much you get out of this experience. In this slide, we'll go over some simple yet powerful ways to get the most value from the training. Refer to these guidelines to steer the discussion. • **Be open-minded** Training introduces new tools and techniques that can level up your performance. Staying open helps you pick up skills that'll be useful down the road, making you more adaptable as a specialist. • **Ask questions** If you're unsure about something, ask! Clarifying things early helps you avoid confusion and learn the right way. • **Take initiative** Don't just sit back, engage! Active participation helps you learn faster and apply what you know better. But remember, it's not all about you. Let others share their ideas too. Remember that everyone's perspective adds value.

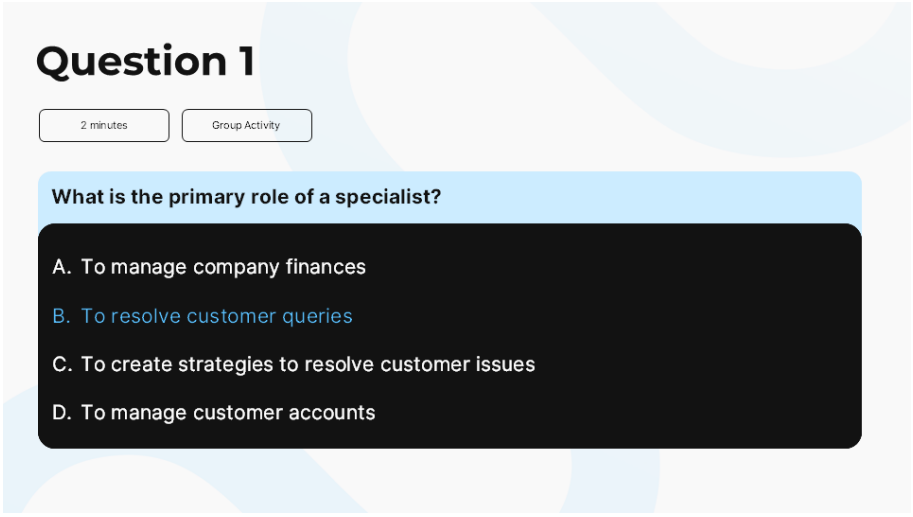
	• **Network with peers** Make connections! Talking with your peers is a great way to share ideas, learn from each other, and build stronger teamwork. • **Review and reflect** Reviewing what you've learned helps it stick. Reflect on how to apply it in real-life situations so you can level up your skills. • **Stay engaged** Focus up! The more you stay engaged, the faster you'll pick up new skills and feel ready to handle anything that comes your way. • **Give feedback** Your feedback makes the training better for everyone. Plus, it shows you're thinking critically about what you're learning**.** • **Prepare beforehand** Arriving prepared allows you to hit the ground running and make the most of your training time.
 Transition	Feeling confident about what you've learned so far? Let's find out!

Day 1 Quiz

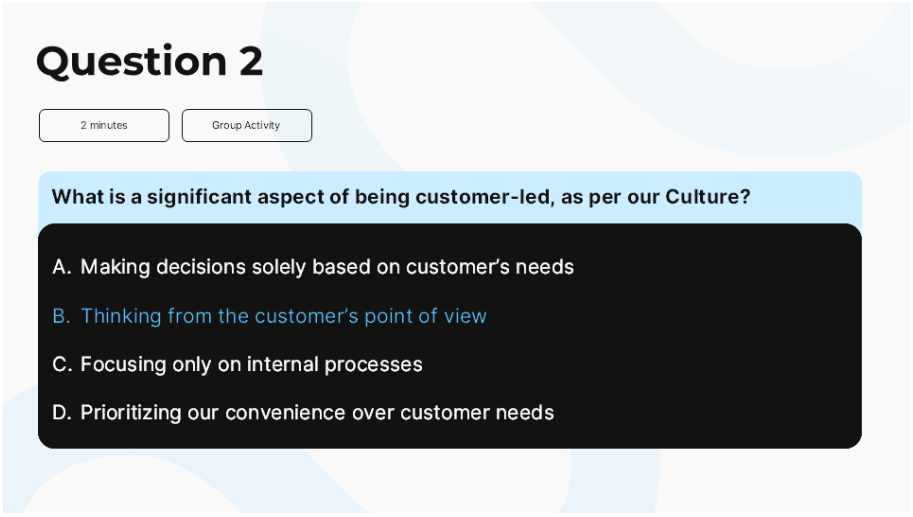
Duration	10 minutes approx.
Slides: 6 and 7	 
Activity	**Quiz Name**: Interactive Quiz Leaderboard Activity: No **Objective**: To reinforce the topics from Day 1 using an interactive quiz format. **Group/Individual/Pair:** Group **Time Required:** 15 minutes **Materials Needed:** NA **Quiz Instructions:** • Divide the class into five groups. (Based on the assumption that there are around 20 participants in a class, with 4 participants in each group.) • Assign one question to each group. If a group cannot answer their question, it will pass to the next group and continue until all groups have had a chance to answer. • Once the correct answer is displayed, move on to the next question for the following group, repeating the process until all questions are addressed.
Talking Points	Let us step back and assess what we learned through this quick quiz.

 Do	Conduct the quiz as per the instructions. Move to the next slides for the quiz questions and answers.

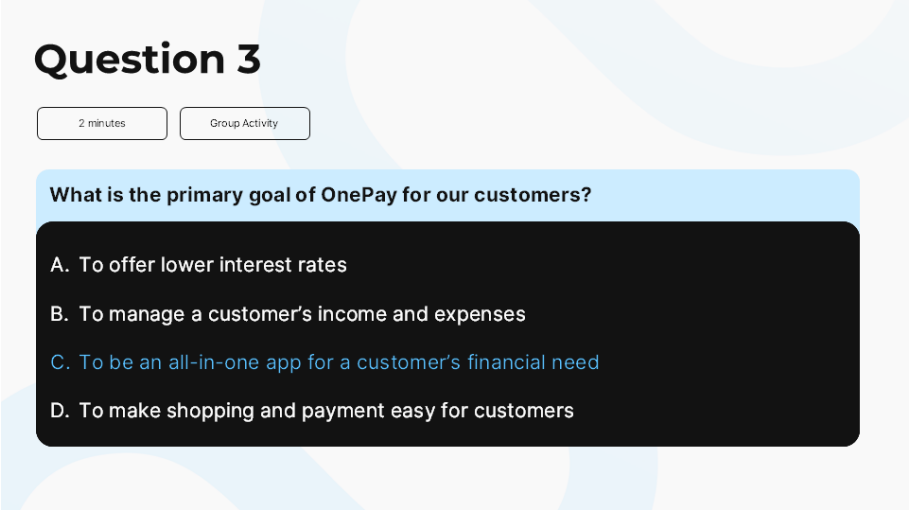
Question 1

Duration	2 minutes approx.
Slide: 8	
Do	In the slideshow, you will find the answer will be highlighted with a click action. Be mindful of these clicks when on this slide. Display the correct answer with the next click. Inform the participants that the correct answer is option B.

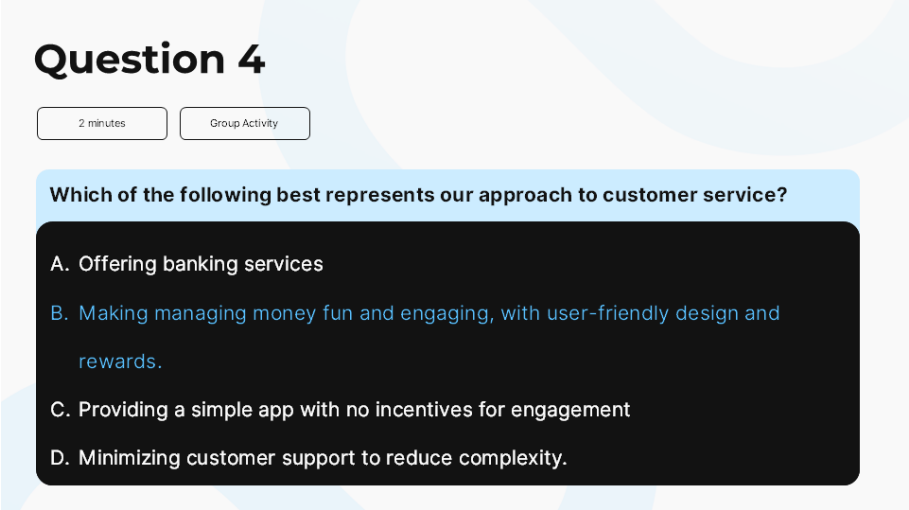
Question 2

Duration	2 minutes approx.
Slide: 9	
Do	In the slideshow, you will find the answer will be highlighted with a click action. Be mindful of these clicks when on this slide. Display the correct answer with the next click. Inform the participants that the correct answer is option B.

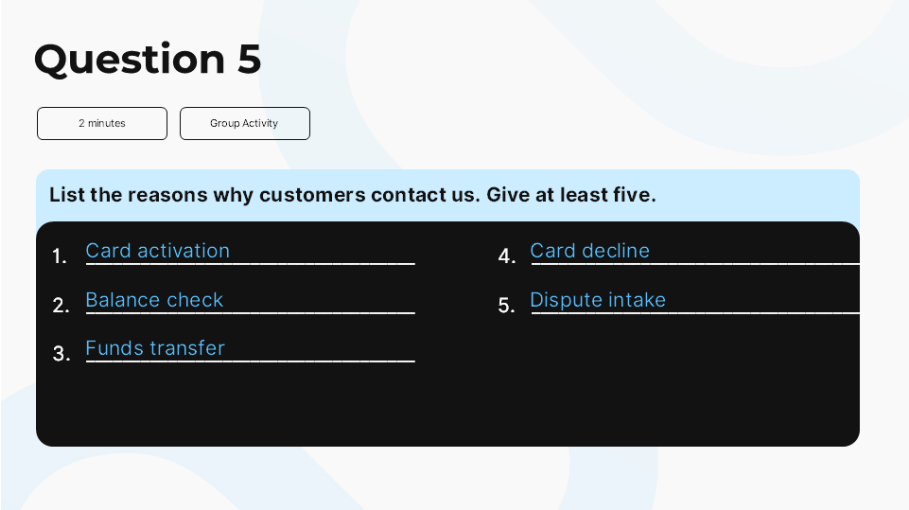
Question 3

Duration	2 minutes approx.
Slide: 10	
Do	In the slideshow, you will find the answer will be highlighted with a click action. Be mindful of these clicks when on this slide. Display the correct answer with the next click. Inform the participants that the correct answer is option C.

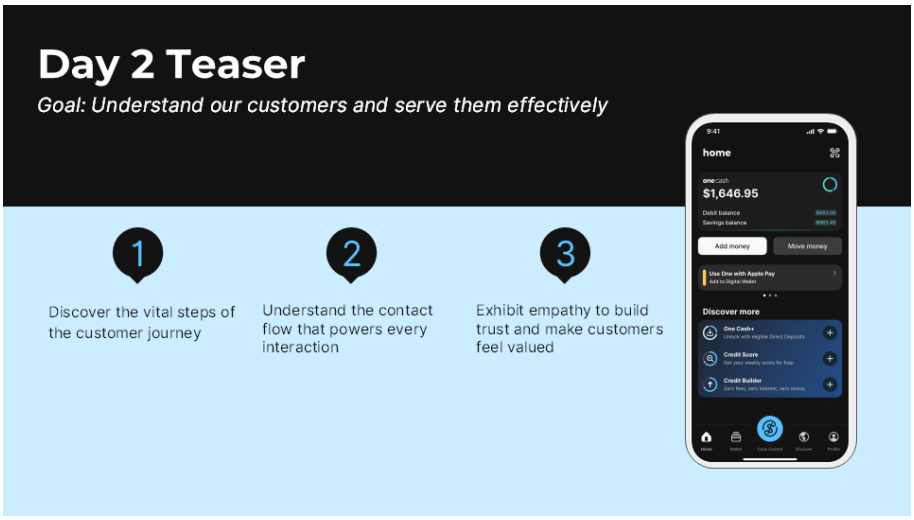
Question 4

Duration	2 minutes approx.
Slide: 11	
Do	In the slideshow, you will find the answer will be highlighted with a click action. Be mindful of these clicks when on this slide. Display the correct answer with the next click. Inform the participants that the correct answer is option B.

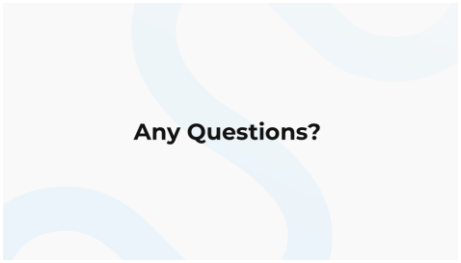
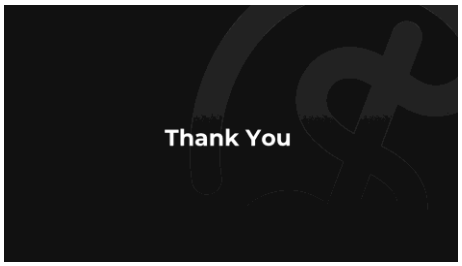
Question 5

Duration	2 minutes approx.
Slide: 12	
Do	In the slideshow, you will find the answer will be highlighted with a click action. Be mindful of these clicks when on this slide. Display the correct answer with the next click. The displayed answers are indicative, and any of the expected responses is correct. **Expected Responses:** 1. Card activation 2. Lost card 3. Balance check 4. Personal details update 5. Funds transfer 6. Card decline 7. Dispute intake 8. Stolen card

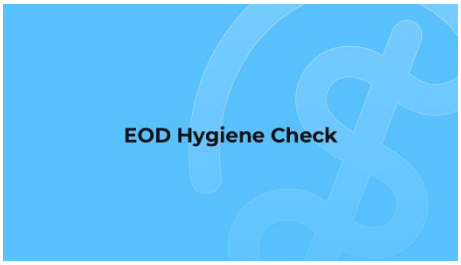
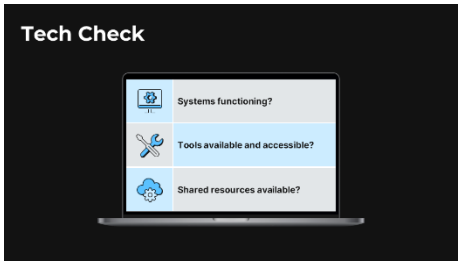
Day 2 Teaser

Duration	3 minutes approx.
Slide: 13	
Talking Points	As we wrap up today's session, let's look ahead. Tomorrow, you'll learn to understand your customers and serve more effectively. You'll sharpen your skills by exploring best practices for exceptional customer service. You'll also explore the contact flow, which ensures smooth and consistent service. Plus, you'll learn why empathy is essential for building trust.
Transition	Great job today, everyone! See you tomorrow!

Any Questions

Duration	15 minutes approx.	
Slides: 14 and 15		
Do	Invite the participants to ask any questions or seek clarifications. Address their inquiries accordingly.	

EOD Hygiene Check

Duration	30 minutes approx.
Slides: 16 and 17	 
Do	• Ensure all the systems are functioning and the required tools are accessible. • Verify if everyone has access to shared documents and resources. Complete and email the New Hire EOD template (from the appendix) to the relevant authorities.

Appendix

Appendix 1: EOD Template

Trainer EOD New Hire Email Summary

Our goal is to streamline the tracking of all BPO site training waves while capturing the daily highlights and areas of opportunity within our training classes. To achieve this, we request that the following information be completed at the conclusion of each training session

Please copy and paste it into an email and list out bullets that apply to your lesson plan for the day.

Example Template

Email Subject title: EOD ONE Wave x | Training Day x of 10 report as of mm/dd/yr

Please see the information below:

Reporting Date	

Class / Wave #	
Account / Program	One
LOB	Customer Support

HEADCOUNT			ATTENDANCE
Starting Headcount	Current Headcount	Actual Headcount	Actual Hours

	ACTUAL	

Absences for the Day		
Training Overall Attrition		

#	First Name	Last Name (s)	BPO Email	OnePay Email	Role	Site	Status
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							
14							
15							
16							
17							

Example

Here's a brief overview of what we've achieved today: (Be Specific)

Highlights of High Performance:

- Identify high-performing specialists who exemplify dedication and proficiency.
- What went well? What successful practices contributed to efficient learning sessions throughout the training class?
- What materials were covered in today's training session?

Areas of Achievement and Success:

- Were tools and resources working as expected? Did they help enhance the learning experience?
    - What activities did you engage in?
    - What module created further group discussion?
- Celebrated moments of collaboration and teamwork that enriched the training environment. (List specific Specialist)
- State strategies and techniques used for optimal knowledge retention
    - How did we know it was okay to move forward to the next lesson plan?
    - How are we feeling about specialist's understanding?

Opportunities for Growth and Enhancement:

- Identified tools that require further attention and troubleshooting.
    - List of specialists who do not have access or are missing tools?
- List Specialists who may benefit from additional support and guidance.
    - How are we helping them keep up with the class?
- Note areas within materials that warrant updates or revisions for clarity and relevance.