

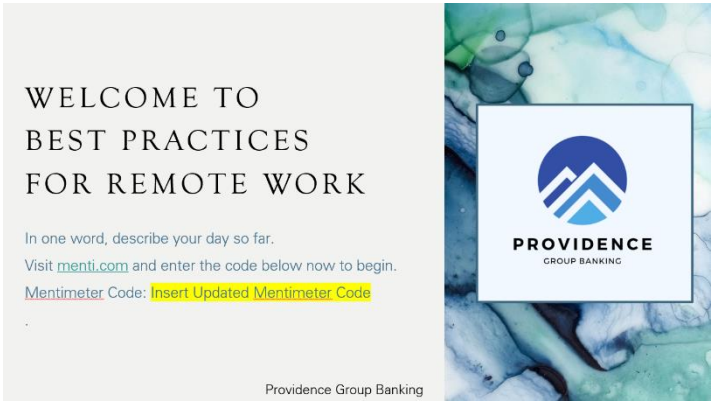

vILT- Best Practices for Remote Work

Producer: Pre-work	<ul style="list-style-type: none"> Before the training, make sure to disable the waiting room and set all participants to automatically mute when they enter.
	<ul style="list-style-type: none"> Set up the breakout rooms (Slide 9 & 16) and assign 3-4 participants to each room based on the number of participants.
	<ul style="list-style-type: none"> Share the slide deck with participants when the vILT begins.

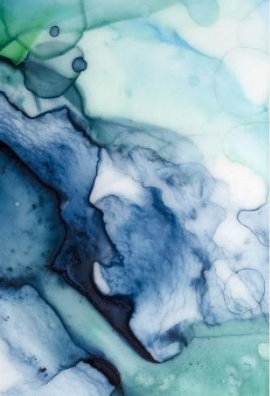





Facilitator Pre-Work:	<ul style="list-style-type: none"> This training was designed specifically for a virtual setting.
	<ul style="list-style-type: none"> You will need the Powerpoint presentation open and shared with all participants.
	<ul style="list-style-type: none"> General commentary is included below, but be prepared to address questions or concerns asked by participants.
	<ul style="list-style-type: none"> There should be a 1-2 minute buffer at the beginning of an engagement to explain the process and a 2 minute debriefing after the engagement when debriefing is stated below.

Session #1		
Slides	Approximate Timing	Topic
1-2	3 minutes	Welcome
3-5	5 minutes	Introduction
6-10	20 minutes	Productivity and Time Management
11-16	15 minutes	Communication in the Virtual Workspace
18-24	15 minutes	Managing Work-Life Balance
25-27	2 minutes	Closure
Total:	1 hour	

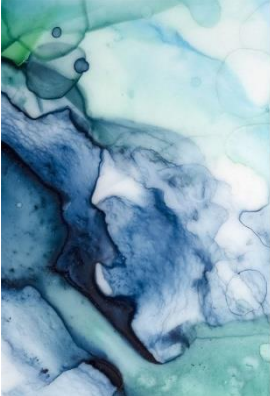

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Slide#) Duration	Slide	Facilitator Notes	Producer Notes
1		<p>DO [as people join]:</p> <ul style="list-style-type: none"> Welcome participants and ask them to follow the prompt on the screen to complete the mentimeter. <p>SAY:</p> <ul style="list-style-type: none"> Share the mentimeter results with participants. Note similarities. 	<p>DO:</p> <ul style="list-style-type: none"> Make sure the facilitator's camera is on and that the PPT is being shared correctly.
2		<p>SAY:</p> <ul style="list-style-type: none"> Welcome participants. Training will last approximately 1 hour. Participants should mute mics unless actively participating. <p>DO:</p> <ul style="list-style-type: none"> Click to reveal each training topic and briefly discuss. 	<p>DO:</p> <ul style="list-style-type: none"> Monitor the chat for questions and support participants with their needs. Let participants into the meeting.

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3	 <h3>INTRODUCTION</h3>	SAY: <ul style="list-style-type: none"> Introduce the new topic 	DO: <ul style="list-style-type: none"> Monitor the chat for questions and support participants with their needs. Let participants into the meeting.
4	 <h3><u>OBJECTIVES</u></h3> <p>At the end of this training, you will be able to:</p> <ul style="list-style-type: none"> ➤ Outline upcoming tasks ➤ Discuss prioritization and time management strategies ➤ Choose an appropriate method of remote communication. ➤ Design a work-life balance plan 	SAY: <ul style="list-style-type: none"> State what participants will be able to do at the end of the training. DO: <ul style="list-style-type: none"> Click to reveal each of the four objectives for this training. 	DO: <ul style="list-style-type: none"> Monitor the chat for questions and support participants with their needs. Let participants into the meeting if needed.
5	 <h3><u>OUR MISSION</u></h3> <p>Providence Group Banking aims to provide world-class financial services to our clients and support our employees in creating a healthy work-life balance.</p>  	SAY: <ul style="list-style-type: none"> Talk about the company mission and mention that balancing their personal and professional life will enable them to create a better experience for our customers. 	DO: <ul style="list-style-type: none"> Monitor the chat for questions and support participants with their needs. Let participants into the meeting if needed.

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6	<div></div> <div><h3>PRODUCTIVITY AND TIME MANAGEMENT</h3></div>	<p>SAY:</p> <ul style="list-style-type: none">Mention the transition into a new topic.	<p>DO:</p> <ul style="list-style-type: none">Monitor the chat for questions and support participants with their needs. Let participants into the meeting if needed.									
7	<div><h3>TASK SETTING</h3><p>At Providence Group Banking, you will be responsible for managing multiple tasks simultaneously.</p><p>You will need to know how to prioritize your workload.</p></div>	<p>SAY:</p> <ul style="list-style-type: none">You will be responsible for managing multiple tasks simultaneously.You will need to prioritize those tasks to manage your workload.	<p>DO:</p> <ul style="list-style-type: none">Monitor the chat for questions and support participants with their needs. Let participants into the meeting if needed.									
8	<div><h3>EISENHOWER DECISION MATRIX</h3><p>This prioritization method helps you make decisions quickly and stay organized.</p><table><tr><td></td><td>Urgent</td><td>Not Urgent</td></tr><tr><td>Important</td><td>Do What to do now</td><td>Schedule What to plan for</td></tr><tr><td>Not Important</td><td>Delegate What to delegate</td><td>Delete What to delete</td></tr></table></div>		Urgent	Not Urgent	Important	Do What to do now	Schedule What to plan for	Not Important	Delegate What to delegate	Delete What to delete	<p>SAY:</p> <ul style="list-style-type: none">Discuss the Eisenhower Decision Matrix<ul style="list-style-type: none">Important & Urgent: Tasks with clear deadlines and consequences.Important: Important tasks with unclear deadlines that contribute to long-term success in a project.	<p>DO:</p> <ul style="list-style-type: none">Monitor the chat for questions and support participants with their needs. Let participants into the meeting if needed.
	Urgent	Not Urgent										
Important	Do What to do now	Schedule What to plan for										
Not Important	Delegate What to delegate	Delete What to delete										

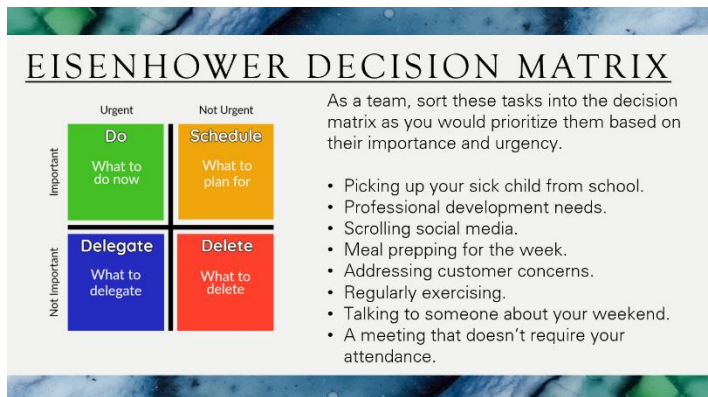
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		<ul style="list-style-type: none">○ Urgent: Tasks that must get done, but might not require your specific skill set. Can be delegated.○ Neither: Unnecessary tasks or distractions from what needs to get done first.										
9	<div><h3>BREAKOUT ROOMS</h3><table><thead><tr><th></th><th>Urgent</th><th>Not Urgent</th></tr></thead><tbody><tr><th>Important</th><td>Do What to do now</td><td>Schedule What to plan for</td></tr><tr><th>Not Important</th><td>Delegate What to delegate</td><td>Delete What to delete</td></tr></tbody></table><p><u>Directions:</u> As a team, sort the tasks on slide 10 into the decision matrix based on their priority.</p><p><u>Time:</u> 5 minutes</p><p><u>Post-Discussion:</u> Be prepared to share out your team decisions as a group.</p></div>		Urgent	Not Urgent	Important	Do What to do now	Schedule What to plan for	Not Important	Delegate What to delegate	Delete What to delete	<p>SAY:</p> <ul style="list-style-type: none">• Announce breakout room task and discuss expectations:<ul style="list-style-type: none">○ Participants will be given a list of tasks, both personal and professional.○ They must decide as a team how each task should be sorted in the matrix based on if it is important, urgent, both, or neither.○ Upon returning to the main room, have a wrap up discussion with participants about what their team decided and what the correct answer for each choice was.<ul style="list-style-type: none">▪ Picking up your sick child from school. (Do)▪ Professional development. (Schedule)	<p>DO:</p> <ul style="list-style-type: none">• Reshare the link to download the slide deck presentation through the chat for anyone who needs it.• Make sure that the breakout rooms function as desired and troubleshoot any problems participants have.• If new participants joined after breakout rooms were created, place the new participants into a room with the fewest number of participants.
	Urgent	Not Urgent										
Important	Do What to do now	Schedule What to plan for										
Not Important	Delegate What to delegate	Delete What to delete										

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		<ul style="list-style-type: none">▪ Scrolling social media. (Delete)▪ Meal prep for the week. (Delegate)▪ Addressing customer concerns. (Do)▪ Regular exercise. (Schedule)▪ Talking to someone about your weekend. (Delete) <ul style="list-style-type: none">• Tell participants that slide 10 in their slide deck has the decision matrix and tasks they will need to sort for this activity. Let them know the slide deck link is being shared in the chat again for anyone who needs it. <p>DO:</p> <ul style="list-style-type: none">• Send participants to their breakout rooms and join several rooms to facilitate discussion as needed.	
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10


**SAY:**

- [Click] Introduce time management strategies
- [Click] The Pomodoro Technique:
 - A pomodoro is a tomato shaped timer, but any timer is ok to use.
 - A pomodoro indicates an interval of time spent working.
 - The Pomodoro technique is:
 - Choose your task.
 - Set the timer for 25 minutes.
 - Work until the timer rings then take a short movement break.
 - Continue the cycle and when you reach 4 pomodoros take a 30 minute break.
- [Click] Time Blocking:
 - Breaking your day into distinct blocks of time that focus on specific tasks.
 - Track the time you spend on each task or time block so you have an accurate count of how long you are

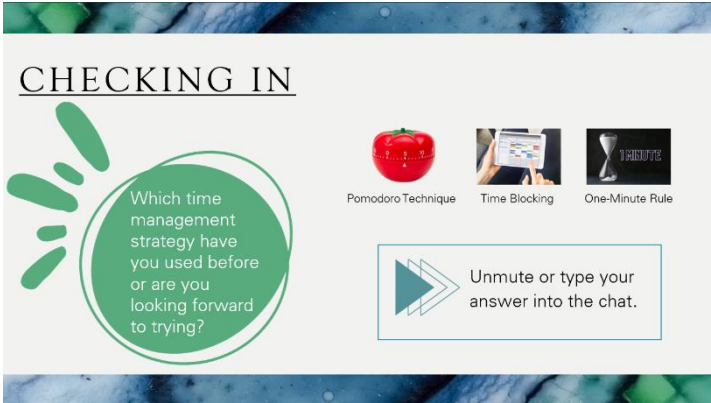

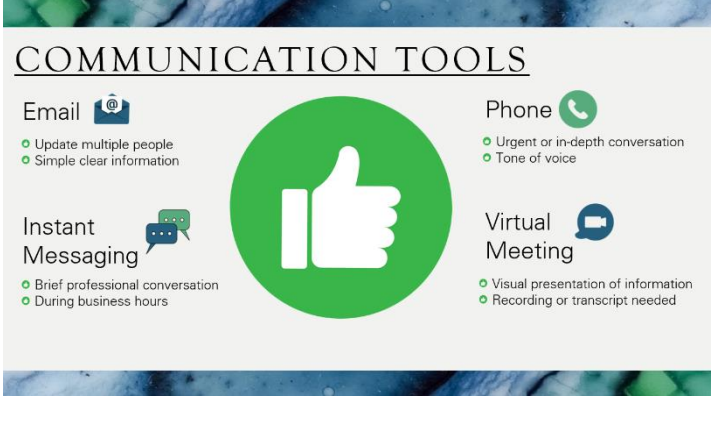
DO:

- Monitor the chat for questions and support participants with their needs. Let participants into the meeting if needed.

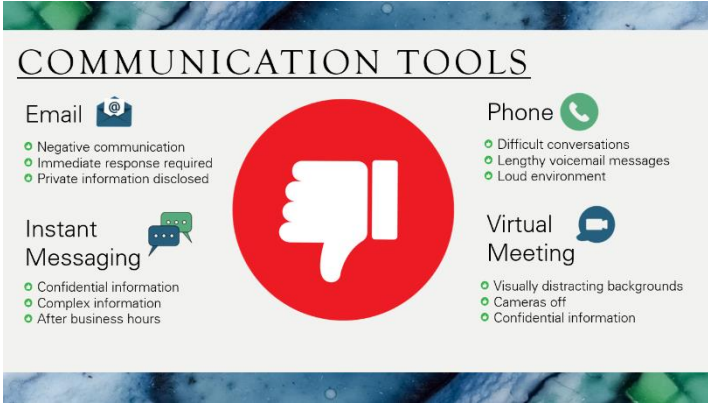
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		<p>spending on tasks in a given day.</p> <ul style="list-style-type: none"> ○ This helps you focus and dive deep into your work and eliminates inefficient multitasking. <ul style="list-style-type: none"> • [Click] The one-minute rule: <ul style="list-style-type: none"> ○ If you can do a task in a minute or less, do it! ○ Examples: responding to an email, scheduling a task, sending a message about an upcoming meeting, running a quick daily report. ○ Helps you feel accomplished. 	
11	 <p>TIME MANAGEMENT STRATEGIES</p> <p>Now that you know how to prioritize your tasks, these strategies can help you manage your work throughout the day.</p> <p>Pomodoro Technique Time Blocking One-Minute Rule</p>	<p>SAY:</p> <ul style="list-style-type: none"> • Briefly recap the pomodoro technique, time blocking and one-minute rule. <p>DO:</p> <ul style="list-style-type: none"> • As participants say or type their responses, make sure to engage with them by commenting on their choices. 	<p>DO:</p> <ul style="list-style-type: none"> • Monitor the chat for questions and support participants with their needs. Let participants into the meeting if needed.

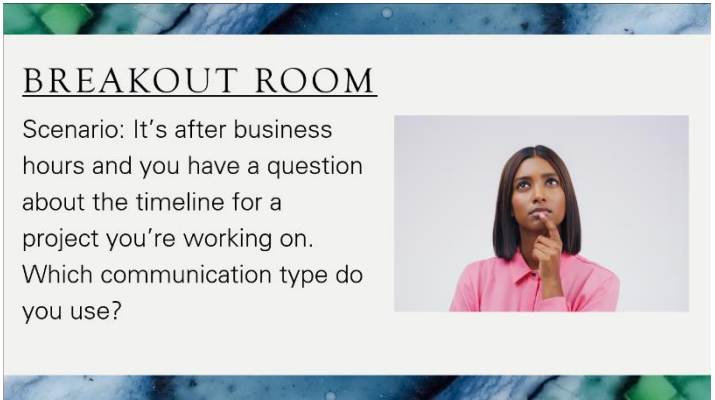

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12	 <p>CHECKING IN</p> <p>Which time management strategy have you used before or are you looking forward to trying?</p> <p>Pomodoro Technique Time Blocking One-Minute Rule</p> <p>Unmute or type your answer into the chat.</p>	<p>SAY:</p> <ul style="list-style-type: none"> Ask the question prompt and allow learners time to respond in the chat or by unmuting. <p>DO:</p> <ul style="list-style-type: none"> As participants say or type their responses, make sure to engage with them by commenting on their choices. 	<p>DO:</p> <ul style="list-style-type: none"> Monitor the chat for questions and support participants with their needs. Let participants into the meeting if needed.
13	 <p>COMMUNICATION IN THE VIRTUAL WORKSPACE</p>	<p>SAY:</p> <ul style="list-style-type: none"> Mention the transition to a new topic. 	<p>DO:</p> <ul style="list-style-type: none"> Monitor the chat for questions and support participants with their needs. Let participants into the meeting if needed.
14	 <p>COMMUNICATION TOOLS</p> <p>Email</p> <ul style="list-style-type: none"> Update multiple people Simple clear information <p>Instant Messaging</p> <ul style="list-style-type: none"> Brief professional conversation During business hours <p>Phone</p> <ul style="list-style-type: none"> Urgent or in-depth conversation Tone of voice <p>Virtual Meeting</p> <ul style="list-style-type: none"> Visual presentation of information Recording or transcript needed 	<p>SAY:</p> <ul style="list-style-type: none"> Discuss best practices for using each type of communication tool (email, phone, instant messaging, and virtual meetings) so that participants know which tool to choose for their needs. Provide a real-life example for each communication tool as you introduce it. <p>DO:</p>	<p>DO:</p> <ul style="list-style-type: none"> Monitor the chat for questions and support participants with their needs. Let participants into the meeting if needed.



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		<ul style="list-style-type: none"> Click to reveal each type of communication tool (Email, Instant messaging, Phone, Virtual Meeting). Each tool has 2 bullet points you will need to click through and discuss. 	
15	 <p>COMMUNICATION TOOLS</p> <p>Email 📧</p> <ul style="list-style-type: none"> Negative communication Immediate response required Private information disclosed <p>Phone 📞</p> <ul style="list-style-type: none"> Difficult conversations Lengthy voicemail messages Loud environment <p>Instant Messaging 💬</p> <ul style="list-style-type: none"> Confidential information Complex information After business hours <p>Virtual Meeting 📺</p> <ul style="list-style-type: none"> Visually distracting backgrounds Cameras off Confidential information 	<p>SAY:</p> <ul style="list-style-type: none"> Discuss when to NOT use each type of communication tool (email, phone, instant messaging, and virtual meetings) so that participants know our expectations for remote communication. Provide a real-life example when possible. <p>DO:</p> <ul style="list-style-type: none"> Click to reveal each type of communication tool again. Each tool has 3 bullet points you will need to click through and discuss. 	<p>DO:</p> <ul style="list-style-type: none"> Monitor the chat for questions and support participants with their needs. Let participants into the meeting if needed.





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<p>16</p>	<div data-bbox="281 142 991 539">  <p>BREAKOUT ROOM</p> <p>Scenario: It's after business hours and you have a question about the timeline for a project you're working on. Which communication type do you use?</p> </div>	<p>SAY:</p> <ul style="list-style-type: none"> • Tell participants they will be going back into their breakout rooms to discuss the given scenario and choose the appropriate communication strategy. • Give 5 minutes for discussion. <p>DO:</p> <ul style="list-style-type: none"> • Send participants to their breakout rooms and join several rooms to listen and facilitate discussion as needed. 	<p>DO:</p> <ul style="list-style-type: none"> • Share the link to download the slide deck presentation through the chat for anyone who needs it. • Make sure that the breakout rooms function as desired and troubleshoot any problems participants have. • If new participants joined after breakout rooms were created, place the new participants into a room with the fewest number of participants.
<p>17</p>	<div data-bbox="281 979 991 1383">  <p>MANAGING A GOOD WORK-LIFE BALANCE</p> </div>	<p>SAY: Introduce the transition to a new topic.</p>	<p>DO:</p> <ul style="list-style-type: none"> • Monitor the chat for questions and support participants with their needs. Let participants into the meeting if needed.

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18	<p><u>KEY STRATEGIES</u></p> <ul style="list-style-type: none"> ➤ Pause and Evaluate ➤ Assess Your Priorities ➤ Time Management ➤ Establish Boundaries ➤ Reflect, Refine, Repeat 	<p>SAY:</p> <ul style="list-style-type: none"> • Work-life balance looks different for everyone. • Click to reveal the five key strategies that create a better balance for the participants. 	<p>DO:</p> <ul style="list-style-type: none"> • Monitor the chat for questions and support participants with their needs. Let participants into the meeting if needed.
19	<p><u>PAUSE AND EVALUATE</u></p> <p>Consider these questions:</p> <ul style="list-style-type: none"> ➤ Am I spending enough time doing what I want? ➤ Are my time and energy spent on people or things that are meaningful to me? ➤ Am I aligned with my personal and professional goals? 	<p>SAY:</p> <ul style="list-style-type: none"> • Introduce the concept of pausing and evaluating by having participants consider these questions and gain greater clarity on their lives. <p>DO:</p> <ul style="list-style-type: none"> • Click to reveal each of the three questions. • Ask if participants would like to share out their answers to the questions. • Interact with those who share. 	<p>DO:</p> <ul style="list-style-type: none"> • Monitor the chat for questions and support participants with their needs. Let participants into the meeting if needed.

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20	<p><u>ASSESS YOUR PRIORITIES</u></p> <p>Consider these questions as you prioritize your day.</p> <ul style="list-style-type: none"> ➤ What really matters to me and am I doing enough of it? ➤ How can I make sure I spend enough time on my goals and relationships? ➤ How can I integrate my responsibilities, so I honor more than one at a time? 	<p>SAY:</p> <ul style="list-style-type: none"> • Continue building upon the previous slide by discussing the questions on this slide. • Focus on what you can do at work (previously discussed time management strategies), so that you can achieve your personal goals and protect your relationships outside of work. <p>DO:</p> <ul style="list-style-type: none"> • Click to reveal each of the three questions. • Check in with participants to see if anyone wants to unmute and respond. • Thank them for their input and have a positive discussion about their thoughts. 	<p>DO:</p> <ul style="list-style-type: none"> • Monitor the chat for questions and support participants with their needs. Let participants into the meeting if needed.
21	<p><u>TIME MANAGEMENT</u></p> <p>Focus on managing your time so you can achieve your goals by using one of the time management strategies discussed earlier.</p> <div>    </div> <p>Pomodoro Technique Time Blocking One-Minute Rule</p>	<p>SAY:</p> <ul style="list-style-type: none"> • Bring participant's attention back to the time management strategies from earlier and connect protecting their time at work to protecting their time at home. 	<p>DO:</p> <ul style="list-style-type: none"> • Monitor the chat for questions and support participants with their needs. Let participants into the meeting if needed.

22

ESTABLISH BOUNDARIES

Setting small boundaries at work can help you maintain a work-life balance.

- Physical- personal space, touch, health, hunger, energy.
- Emotional- your feelings, coworkers' feelings, mental energy.
- Time- time management, requests

**SAY:**

- Explain that creating healthy boundaries at work increases employee happiness and lowers the risk of burnout.
- Discuss some examples of how participants can practice setting boundaries with these examples:
 - [Click] Physical
 - [Click] Emotional
 - [Click] Time



SAY:

- Discuss some small changes they can make like:
 - Closing the door/wearing noise cancelling headphones to get some quiet time
 - Setting clear agendas for a meeting to minimize distractions
 - Focusing on a project's objectives if you are working alongside a difficult coworker.

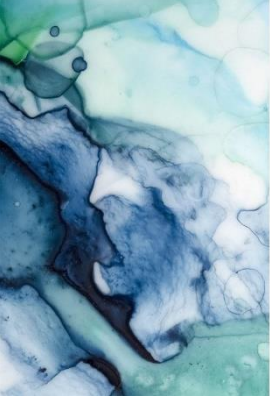


DO:

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23	<p><u>REFLECT, REFINE, REPEAT</u></p> <p>Life changes and your priorities will shift over time. It's important to reflect on your current work-life balance and make small changes that improve your experiences at work and at home.</p> 	<p>SAY:</p> <ul style="list-style-type: none"> Remind participants that they will need to refine the boundaries and choices they make to ensure their work and home life stay balanced as things change. 	<p>DO:</p> <ul style="list-style-type: none"> Monitor the chat for questions and support participants with their needs. Let participants into the meeting if needed.
24	<p><u>INDEPENDENT REFLECTION</u></p> <p>Take the next 5 minutes to analyze your priorities and determine 2-3 small boundaries you can set at work that can help you achieve your goals.</p> 	<p>SAY:</p> <ul style="list-style-type: none"> Have participants take the next 5 minutes to reflect on their priorities and determine 2-3 small boundaries they can set at work that will help them achieve their goals. Participants will not be required to share when time ends, but they may if they would like to. <p>DO:</p> <ul style="list-style-type: none"> Click play on the 5 minute visual timer with music so participants can monitor their time while working. 	<p>DO:</p> <ul style="list-style-type: none"> Monitor the chat for questions and support participants with their needs. Let participants into the meeting if needed.

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25	 <div data-bbox="575 321 768 358">CLOSING</div>	SAY: <ul style="list-style-type: none"> Introduce the closure 	DO: <ul style="list-style-type: none"> Monitor the chat for questions and support participants with their needs. Let participants into the meeting if needed.
26	<div data-bbox="296 618 499 651"><u>SUMMARY</u></div> <p data-bbox="296 662 646 889">Now that you understand how to set priorities and manage your time, communicate in the workplace, and set healthy work-life boundaries, you're ready to take on your new career with Providence Group Banking.</p> 	SAY: <ul style="list-style-type: none"> Review what's been learned in this training and let participants know that they have the knowledge needed to start out their new career confidently. 	DO: <ul style="list-style-type: none"> Monitor the chat for questions and support participants with their needs. Let participants into the meeting if needed.
27	<div data-bbox="333 1019 930 1057"><u>THANK YOU FOR ATTENDING!</u></div> 	SAY: <ul style="list-style-type: none"> Thank participants for attending Ask them to provide feedback on the session using the training satisfaction survey that is posted in the chat before leaving the training. DO: <ul style="list-style-type: none"> Answer any participant questions. End the virtual training by leaving the meeting. 	DO: <ul style="list-style-type: none"> Post the google form satisfaction feedback survey in the chat for participants to complete before they leave.

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