

# connections

## New MA Training Schedule

### Day 1 | Monday

- 8:00 Welcome & Connect
- 8:30 CU vs. Bank
- 8:40 FORUM Story  
w/ Doug True
- 9:50 Goals & Projections  
w/ Jeff Welch
- 10:40 Break
- 10:55 Putting it Together  
w/ Jenny Budreau
- 12:00 Lunch (Provided)
- 1:00 Personal Finance
- 2:30 Project FORUMway
- 3:00 HQ Amazing Race
- 4:15 Debrief Day

### Day 2 | Tuesday

- 8:00 Connect & Review
- 8:30 Employee Policies  
w/ Anne Wiseman
- 9:00 Data Security
- 9:30 Intro to Technology
- 11:30 DiSC Assessment
- 12:00 Lunch
- 1:00 Membership Basics
- 1:30 Products
- 2:45 Time Cards & Benefits

### Day 3 | Wednesday

- 8:00 Regulations
- 8:30 DNA General Use &  
Relationship Profile
- 12:30 Lunch
- 1:30 Diversity & Inclusion  
Training
- 2:30 Workplace Conduct &  
Ethics
- 3:00 DiSC
- 4:30 Bank Secrecy Act

### Day 4 | Thursday

- 8:00 Connect & Review
- 8:30 DNA Inquiries  
& Maintenance
- 12:00 Lunch
- 1:00 Cash Handling &  
Counterfeit Currency
- 2:30 Building Member Loyalty

### Day 5 | Friday

- 8:00 Connect & Review
- 8:30 Benefits Q & A
- 9:15 Retail & SBO Guidelines
- 10:15 Check Handling & Preventing Fraud
- 11:45 Check Holds
- 12:00 Lunch
- 1:00 DNA Transactions
- 4:00 DNA Transaction Set #1

### Day 6 | Monday

- 8:30 Facilitated Transaction Observation  
(Meet at Branch)
- 12:30 Lunch
- 1:30 DNA Transaction Set #2
- 3:00 Cumulative Transactions & Inquiries

### Day 7 | Tuesday

- 8:00 Review FORUM History &  
Products
- 8:30 Review DNA System
- 9:00 Review Transactions & Inquiries
- 9:30 Final Assessment

*When Final Assessment is complete, take your lunch and report to your home branch!*