# SA University Overview

New Client Experience

Transition Manager Facilitator Guide

Last Updated: August 2022

*Table of Contents*

**Facilitator Overview**

This guide provides detailed instructions to aid you in facilitating SA University Overview. Use this guide in conjunction with screen sharing using Webex and SAC.

Estimated training time: 15-20 minutes

Using This Guide

While this guide contains information you can relay verbatim, for best results, customize your presentation to make it your own.

NOTE: Text prefaced by Facilitator Note is verbiage that is directed towards the facilitator.

*Text that is italicized is Facilitator "speaking" suggestions.*

- The highlights indicate when each learning segment or activity should occur

Icon Legend

| Name | Icon | Description |
|------|------|-------------|
| Objective / Topic | | Facilitator Notes<br><br>Notes to you as the facilitator |
| Review / Explain | | Facilitator Talking Points<br><br>Relay the information captured in this section. |
| Ask | ? | Ask participants the questions captured in this section. You can choose to use all, some or create your own questions to pose to the participants. |
| Time Allotted | | Time in this section. |
| Next Topic | | Transition to the next topic |

**Facilitator Preparation**

To ensure smooth delivery of virtual training, do the following prior to your session:

Training Materials

Review the contents of the Facilitator Guide to become familiar with when and how to refer to them during your lessons.

Classroom / Virtual Learning Session

- Prepare scenarios, real-life examples, Customer's master account number, Demo accounts etc. that can emphasize and reinforce key points of the topic (if applicable to this topic)
- Prepare in advance to set up applicable resources (GLANCE, WebEx, etc.)

Equipment

Test facilitator computer to ensure it works properly and you have the required software, to prevent unnecessary delays in the session.

- Internet Explorer/Chrome
- SAC
- SA University
- WebEx

Pre-work for Class

No Pre-work is needed for this demonstration

**SA University Virtual Learning Session**

**Facilitator Talking Points**

*Welcome to the SA University Overview.*

Agenda

**Facilitator Notes**

Review the course agenda with participants.

- Accessing SAC.com
- How to Access SA University
- How to locate pre-work training
- Record keeping
- Additional courses in the library

**Ask**

*Does anyone have any questions before we begin?*

Why SA University?

**Facilitator Talking Points**

*SA University is a comprehensive library of learning resources to help you get the most out of Company's platform.* The online training courses will help increase business and operational excellence with a broad range of topics - from account servicing, moving money, digital capabilities to trading.

**SAC.com > SA University**
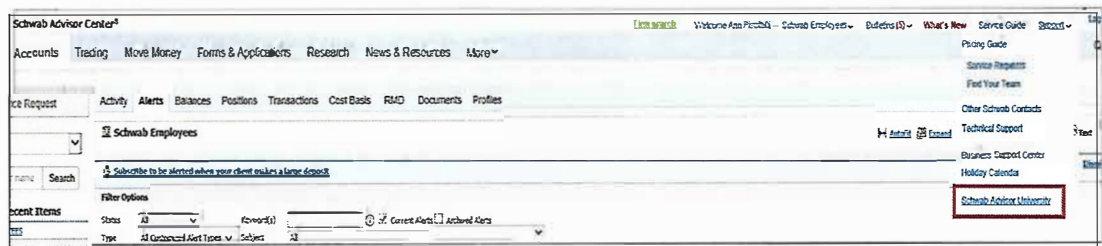
Using the SAC Website to Access the University

**Facilitator Talking Points**

*Let's begin by accessing SAC.com.*

*To access SAU.com, log into SAC.com at:*

Web Address: www.samplewebaddress.com

*Once you log in, you will click on the link **SUPPORT** in the upper right-hand corner to access a menu.  The last option on the list is **SA UNIVERSITY**.*



**Ask**

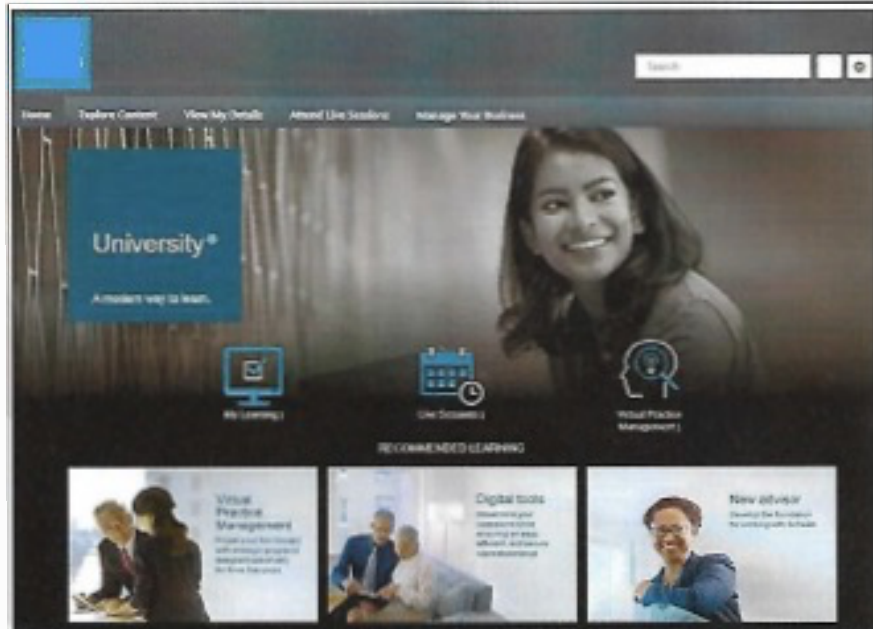*Let's stop here to see if anyone has any questions up to this point?*

**SAU.com > Welcome page**

Logging into SAU.com

**Facilitator Talking Points**

*Clicking on the SA University link will take you directly to the University using a single sign-on, so you have one less password to remember. You will begin at the University home page.*



**Ask:** *Any questions?*
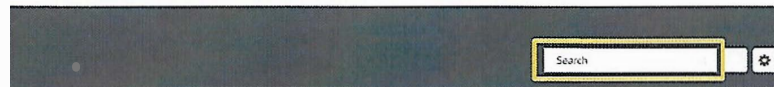
**SAU.com > SAU Homepage**

SAU Homepage

**Facilitator Talking Points**

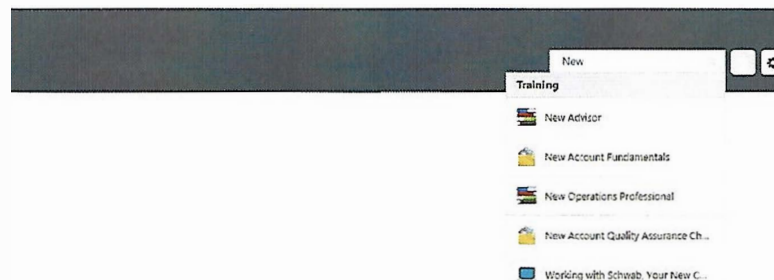*The home page allows quick access to content through easy to use site navigation:*

1. *Global Search*
2. *Settings*
3. *Menu Bar*
4. *Quick Link Icons*
5. *Quick Links for Recommended Learning*



*The global **Search** field is an intelligent search engine that quickly locates specific content.*



As you enter your query into the field, the predictive search feature will display matching content and its training type.

**Facilitator Notes**

Explain and demonstrate the different training types

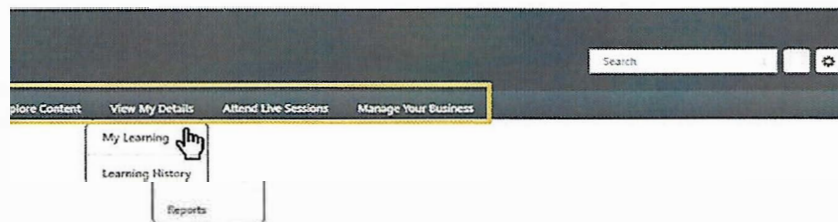| Image | Type | Description |
|-------|------|-------------|
| | Online Class/Video | Short course or instructional video |
| | Material | Task guidance job aid |
| | Curriculum | Courses grouped together based on topic |
| | Event/Session | Live instructor-led session |
| | Program | Collaborative learning environment |

**Facilitator Talking Points**

*Hover over the **Settings** icon and click on "My Account" to access your Preferences page. You can view your name, upload a photo, and change the time zone displayed for live sessions in the calendar.*



*The **Menu** bar allows you to navigate to additional pages such as your personal home page, history, and more. Hover over the titles to display a drop down menu of available pages.*

**Facilitator Talking Points**

*The **Quick Link** icons take you directly to the commonly visited pages.*



**Facilitator Notes**

Explain and demonstrate the different training types

| Icon | Page |
|---|---|
|  | Guides you to your personal homepage to view assigned, in-progress, featured, recommended, and completed courses. |
|  | Navigates you to a calendar view of available live instructor-led sessions, allowing you to register for the date and time that is best for you. |
|  | Directs you to the Virtual Practice Management landing page where you can participate in strategic programs that empower you to improve and grow your business. |

SAU Homepage (con't)

**Facilitator Talking Points**

The quick links for **Recommended Learning** direct you to skill-based curriculums, which include courses that are grouped and sequenced to target your development.



**Ask:** *Any questions?*

SAU.com > Training Courses and Learning Paths

Training Courses and Learning Paths

**Facilitator Talking Points**

*You can **Explore Content** through navigation menu.  Not sure where to begin? Use our **Recommended Learning** page to receive course recommendations based on your role or experience level.*
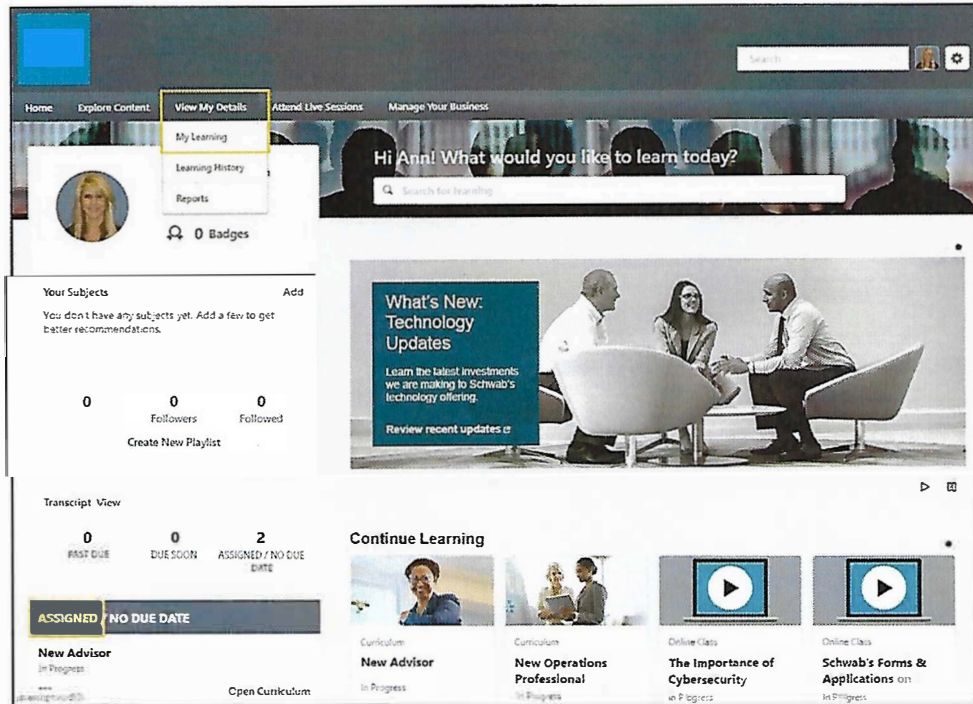


SAU.com > Accessing Pre-work Assignments

Accessing Pre-work Assignments

**Facilitator Talking Points**

*Training courses will be assigned to you and will take 15-30 minutes depending on the topics.
To access the training, select **My Learning** in the **View My Details** in the menu bar.*



*Assigned courses will be listed in your personalize homepage in the Training Side Bar on the left
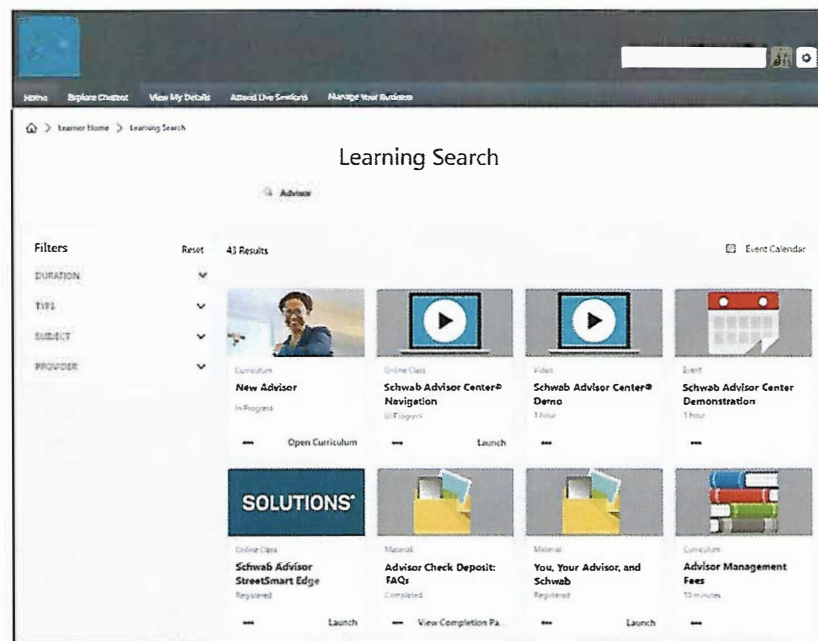side of the page.*

**Ask:** *Any questions?*

**SAU.com > Search for Course**

Search for Course



**Facilitator Talking Points**

*If you would like to search for a specific course select* **Explore Content** *and then* **Search for Course.** *Here, you can access our comprehensive library of learning resources and various learning formats.*





**Ask:** *Any questions?*

**SAU.com > Practice**

Practice- Course Location

**Facilitator Talking Points**

*Let's practice by searching for "Document". The intuitive search function will display all available courses on the topic. Let's select "Transmitting and Tracking Your Documents."*

Practice- Course Location (con't)

**Facilitator Talking Points**

*You will be directed to the Learning Details page which display a short description and duration of the course. Select "Launch" to play the video.*



**Facilitator Notes**

Guide the IA to this instructional video and show a sample of the micro-learning strategy.

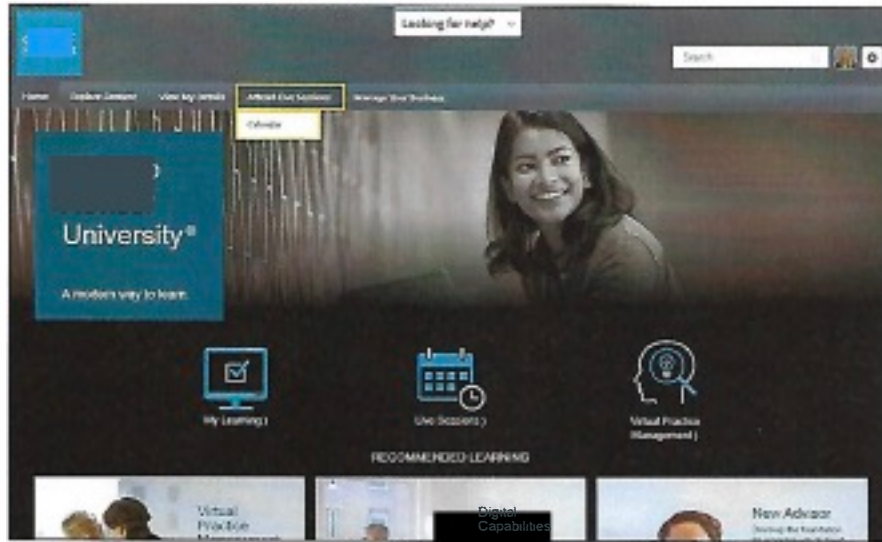**Ask:** *Any questions?*

**SAU.com > Live Instructor Led Sessions**
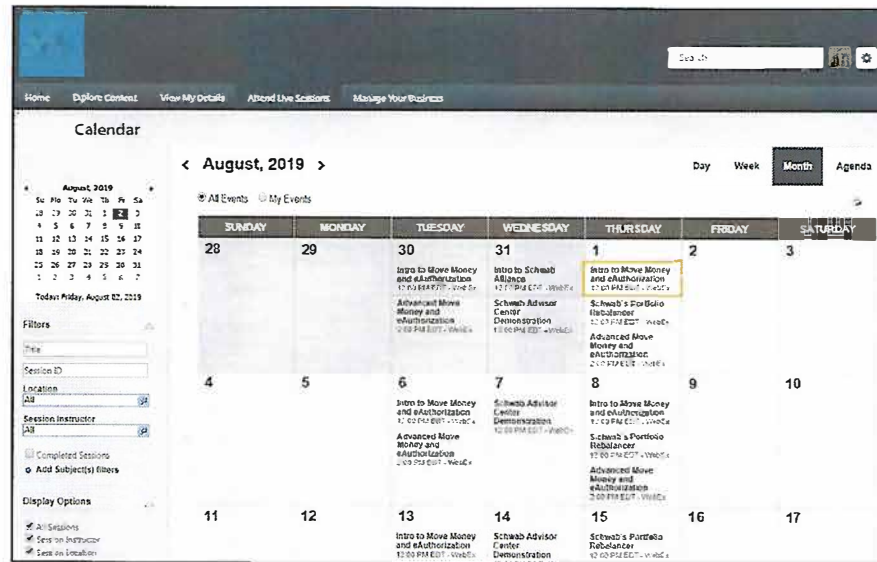
Live Instructor Led Classes

**Facilitator Talking Points**

*If you prefer to participate in a live demonstration, Select **Attend Live Sessions** to view a calendar of available events.*



*Click on the title of the event to view more details.*



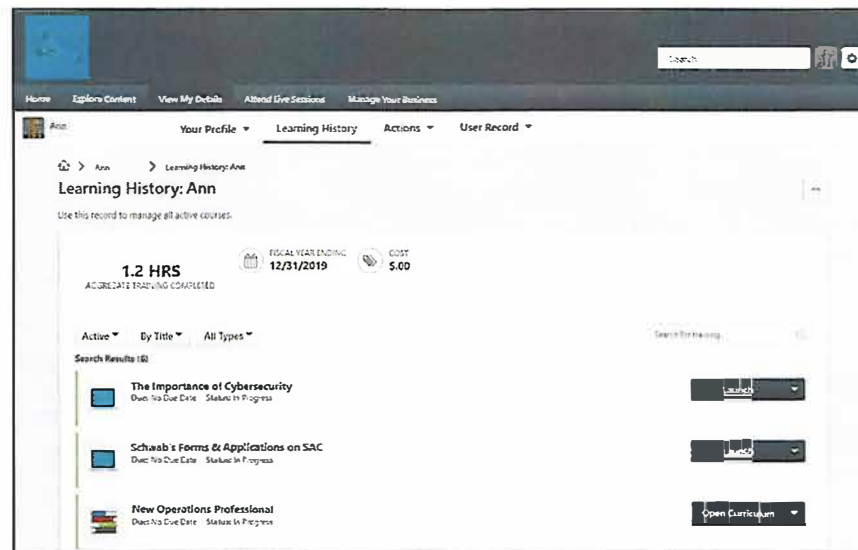**Ask:** *Any questions?*

⮕ **SAU.com > Live Instructor Led Sessions**

Record Keeping of Completed Courses



**Facilitator Talking Points**

*You may access your completed courses in the **View My Details** menu and then select **Learning History.***
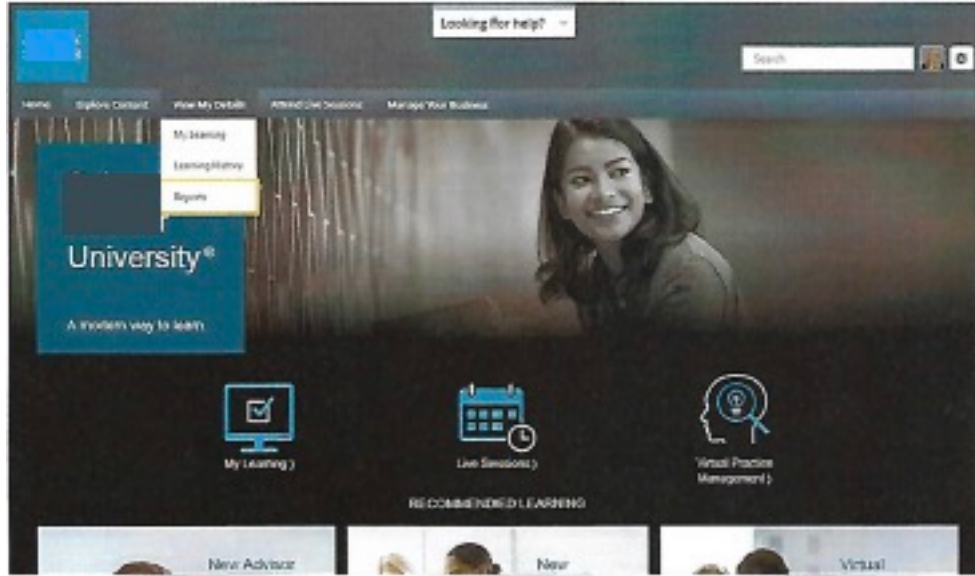
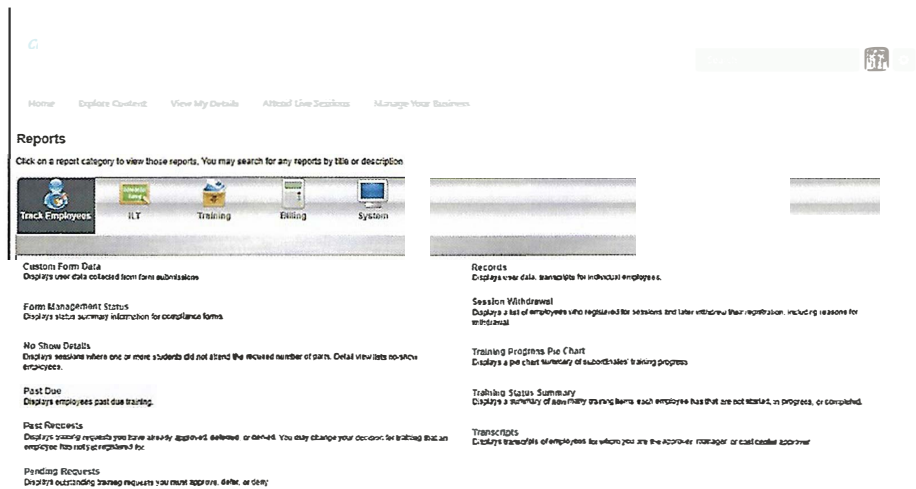**Record Keeping of Completed Courses (con't)**

**Facilitator Talking Points**

*If you are the administrator, you may also view your staff's training records.*



*You may export the records to excel.*



**Ask:** *Any questions?*

**SAU.com > Next Steps**

**Company Name**

## Next Steps

### Facilitator Talking Points

*Now that we've given you an overview of SA University, the next steps are to give you time to practice navigating and locating information on SAU.com on your own.*

*Next meeting we will cover the SAC.com. To make the most of our next call, please complete the following coursework prior to our call:*

- **Navigating Schwab Advisor Center Course**- a high-level 3-minute video that shows the features of the platform to be previewed prior to meeting with TM
- **Introduction to SAC** a deeper dive, 20 minutes operations video and 10-minute trading video.  (if ops person does not place trades they will not complete trading section of the video) **Maintaining Accounts** – SAC.com 5
- minute video

### Facilitator Notes

Assure participant that a follow-up email will be sent with the name of the courses.

## Questions

### Ask

*Any questions before we end this session?*

## Thank you

### Facilitator Notes

Set up the next meeting time (if not already done) and thank the participant(s) for attending.