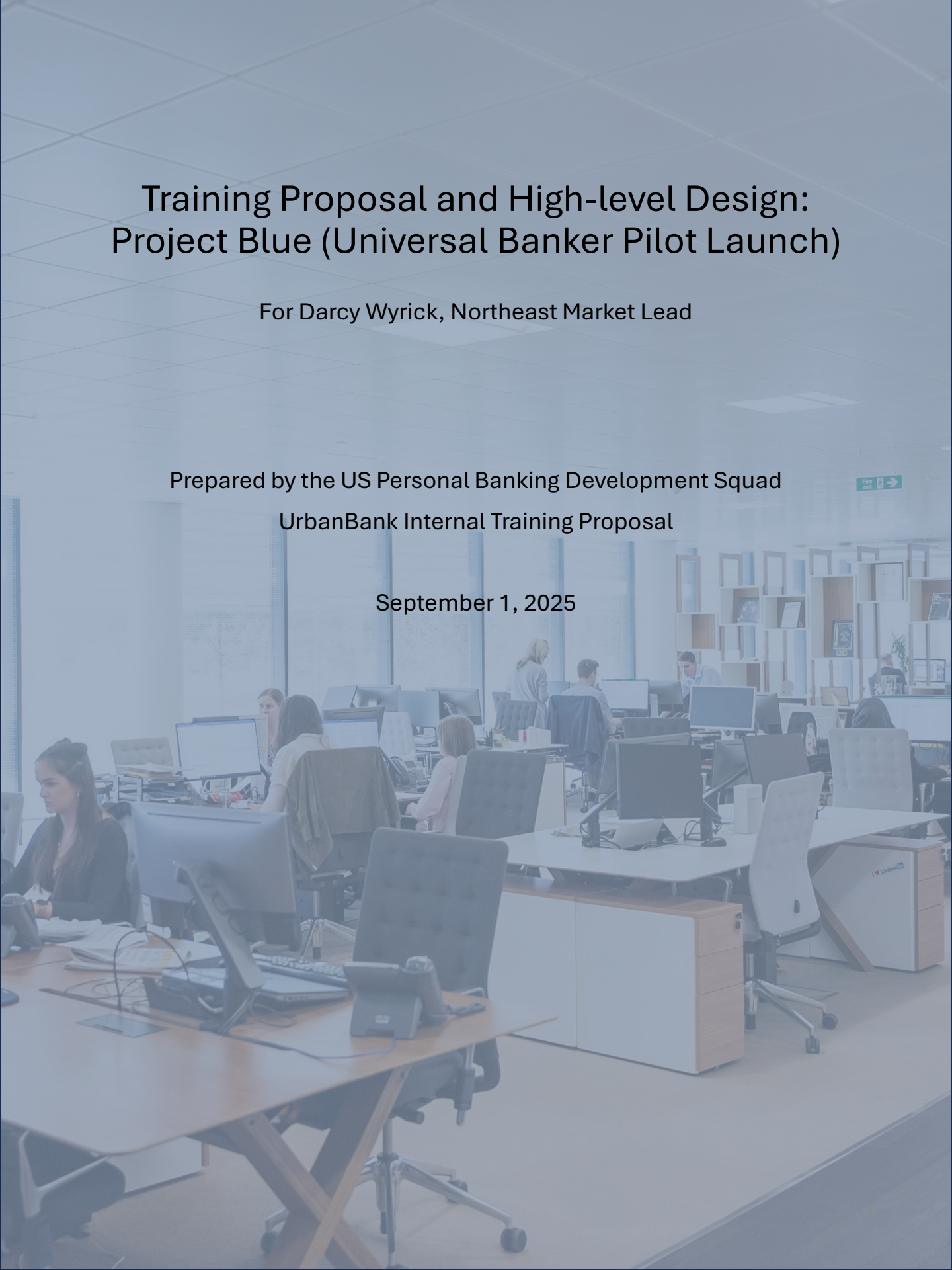


Training Proposal and High-level Design: Project Blue (Universal Banker Pilot Launch)

For Darcy Wyrick, Northeast Market Lead

Prepared by the US Personal Banking Development Squad
UrbanBank Internal Training Proposal

September 1, 2025



Overview and Introduction

The Project:

Per the announcement on the Personal Banking all-hands meeting on August 15th, 2025, the concierge role in branch operations will be discontinued, and the Universal Banker role will be introduced.

While the universal banker role will assume the primary customer service and greeter responsibilities of the concierge, they will also have elevated expectations of floating between a line-teller position and some limited personal banking responsibilities.

The Northeast market has been selected as the test market for this transition – it is our goal to develop training for new hires and incumbent staff to successfully integrate this new role into day-to-day operations of the branch.

If the test is successful, the change will be introduced to the full market.

The US Personal Banking Development Squad has been assigned to assist in the analysis, design, and implementation of training elements to support this initiative.

Core Team

These team members will be your primary points of contact:

Irene Petros - Learning Advisor:

Irene will be serving as project manager for this project. 22 years with the bank with the last 7 years in Learning Advisory Project Management – She will be the primary contact working with your senior stakeholders concerning overall scope, timelines, project goals, and budgets. *New York, NY Telecommuter (Eastern Time zone).*

Ben Steinwand – Senior Content Author and Learning Design:

Ben will oversee and assist other authors in production of training materials as well as directly authoring projects himself. He will manage and upload finished materials to the Learning Library Central Database and version control. In 16 years with the bank, his work history includes on-the-job trainer, content authoring, and learning design. *Sioux Falls, SD Telecommuter (Central Time zone).*

Denise Argan – Senior Delivery Facilitator:

Denise brings over 30 years of classroom facilitation experience to our team. She will take the lead on matters regarding instructor led training and interacting directly with learners. She will also be the dedicated facilitator for the instructor led elements during the pilot and testing phases of the project. *San Francisco, CA office (Pacific Time zone).*

Deb Cooper – Senior Media Designer:

Media designer with 10 years experience – Deb will be primarily responsible for production of any multimedia assets in the training. She will also consult with the rest of the team as needed on visual elements within their projects. *Boise, ID Telecommuter (Mountain Time zone).*

Additional Support

These team members will also be working with you:

Rob Nielsen - Learning Design *Tampa, FL Office (Eastern Time Zone).*

Julie Rojas - Learning Design *Tampa, FL Office (Eastern Time Zone).*

Jeff Roman - Content Author *Portland, OR Telecommuter (Pacific Time zone).*

Julia Birk - Media Design *Newark, NJ Telecommuter (Eastern Time Zone).*

Methodology and Approach

Development Methodology:

This team utilizes a flexible, iterative methodology known as the ‘Agile’ approach – meaning we are focused on producing outcomes quickly in small increments, and presenting those results for feedback.

Here’s [more information](#) if you’re curious but in short, here’s what it will mean for you:

- We work in *sprints*. Each sprint lasts about a month, depending on the workload and delivery date in question. Before the start of the sprint the stakeholders will meet with the project manager and development team to discuss goals, desired outcomes, and timelines for that sprint. The project manager coordinates the priority list with stakeholders and aligns the development team’s tasks accordingly.
- Project manager will bring the priority list to the development team. The development team assigns out the individual work increments and starts work.
- We will produce prototypes and drafts rapidly, and we will frequently ask for input and feedback from your team to further polish and iterate upon the drafts.
- At the end of the sprint, the whole team meets with the stakeholders to review the work and seek approval on the work done. If approved, the work item is finished. If more work is needed feedback is gathered and the work is moved to the next sprint for further iteration. The sprints carry on in this manner until all items in the project are completed and ready to launch.

Pedagogical Approaches:

Our structured training curricula of this size usually consist of a mix of instructor led content, Web based trainings, and self-directed trainings.

- **Instructor Led:** Traditional classroom or virtual classroom training, where a delivery facilitator leads a class through a presentation and talks through concepts with the learners. Our instructors are all certified in Elite Facilitation and Technology of Participation (ToP) facilitation. These methods help promote learner engagement in the content.
- **Web-based training:** The learner will progress through a prepared pre-programmed presentation at their own pace. Most of these programs will include graded and ungraded solo activities that they must complete prior to the system marking their completion of the activity.
- **Self-directed study:** Worksheets, study guides, and other smaller activities given to the learner for them to work through on their own. Facilitators will often debrief the activity at the next class meeting but not always.

Regardless of delivery method, all of our training materials incorporate the **3E’s of learning** whenever possible: Education, Exposure, and Experience.

To illustrate, consider the process of teaching a new banker to open a checking account.

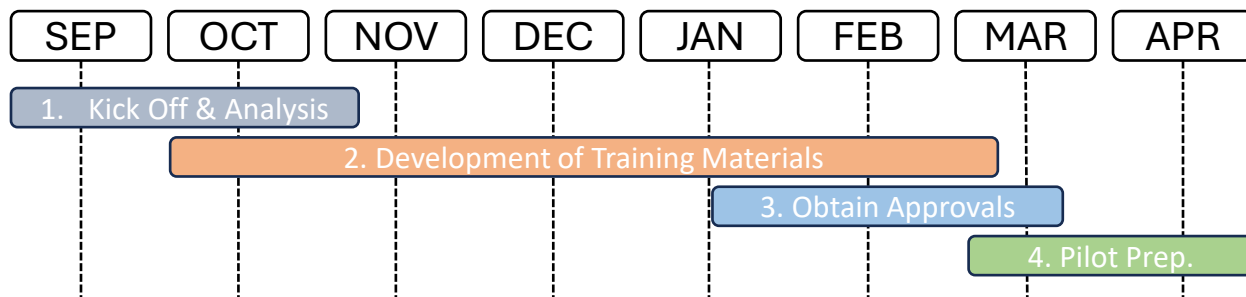
First the learner would receive a conceptual level lesson in class (education), then perhaps they would role play the conversation with a classmate or observe a trained banker opening an account (exposure), and finally when they are ready, they would have the client conversation or open the account themselves with a trained banker observing and providing feedback (experience).

As part of this, we build in **Observation and on-the-job training** into the program. At times learners will be directed to watch their colleagues complete specific tasks or they may be instructed to complete the task while a colleague watches them and provides feedback.

Development Plan Overview and Timeline

Based on initial analysis, we anticipate roughly half of the course can leverage existing resources from the teller and personal banker training programs with some minor changes. This allows us to estimate completion by early Q2 2026. This aligns with your target go-live date of April 22, 2026.

See below for a general development timeline.



Phase 1: Project Kick Off and review/analysis of existing resources.

Development team and Stakeholder team will meet to formulate more detailed project timelines, goals, and desired outcomes. Development team begins reviewing existing assets for reuse opportunities and formulates development plan to be approved by stakeholders.

Phase 2: Development of training materials.

Once development plan approves start of work, development and co-creation of resources may begin. The development team will work with the Subject Matter Experts (SMEs) as chosen by the stakeholders to develop learning content in the sprint format discussed in the development methodology section. Close coordination between the two teams at this phase ensures accuracy and quality of the outcome.

Phase 3: Obtain Approvals.

SMEs will review individual assets for approval or feedback at the end of the sprint they are finished. As each asset is finished, Learning designers will coordinate with Risk, Legal, and Compliance departments to request their approval or feedback.

Phase 4: Final Preparations for pilot program launch.

We will work with Central Training and HR onboarding to add new class to the training schedule and populate the class with new hires after the launch date. Development squad will attend the first run of the class as silent observers to take notes and monitor for issues or changes. Stakeholders and SMEs are welcome and encouraged to attend if they wish.

Beyond The Pilot: Monitoring and Data Collections

To ensure long-term ROI, we recommend a robust post-pilot monitoring phase. The development team is happy to complete the monitoring and provide regular reporting to your specifications to assist with decisions on next steps. Let us know if you are interested in this sort of data and reporting. In most cases monitoring KPIs at regular intervals and comparing to pre-launch baselines is sufficient (example: 30-60-90 day statistical reporting and surveys).

High Level Design

Based on what we know so far, here's a preliminary high-level agenda for this course:

Day	Timing	Asset Name	Topics Covered	Resource ID
1	1.00 hr	Welcome to UrbanBank!	Welcome and Vision	51101
1	0.50 hr	Intro to your Onboarding	Orientation	51102
1	0.50 hr	Workday Systems	HR and Timesheets	51103
1	0.25 hr	Profile Setup	Self-directed activity	51104
1	2.00 hr	HR: Our Culture	Mandatory HR Module	51105
2	1.00 hr	Get to know your Team	Team Orientation	51106
2	1.00 hr	Get to know your Branch	Facilities/Security	51107
2	3.00 hr	Peer Observation	Shadowing a colleague	51108
3	1.00 hr	Client-Centered Culture	Service Mindset	51109
3	1.00 hr	Engaging with Clients	Behavior Model	51110
3	1.00 hr	Measuring Satisfaction	Interpreting NPS Surveys	51111
3	1.00 hr	Client Outreach	Outreach Primer	51112
4	2.00 hr	The Dual-Role Workflow	Transitioning between Teller and Platform	51113
4	2.00 hr	Essential Transactions	Deposits, Withdrawals, and Compliance	51114
4	1.00 hr	Escalation Procedures	Identifying Complex Client Needs	51115
5	1.50 hr	Privacy & Regulatory Risk	Banking Regulations & Data Security	51116
5	2.50 hr	Simulation Lab	Roleplay: Integrated Service Scenarios	51117
5	1.00 hr	Week 1 Wrap-up	Q&A and Self-Study Assignment	51118

Conclusion

This proposal serves as a starting point for our collaboration. It shows our initial impressions and understanding of the scope of work. These impressions establish a framework for our partnership. We look forward to refining this scope with your input to ensure a seamless transition for the Northeast market.

If you have questions, concerns, or additional thoughts on the project scope or content, please do not hesitate to reach out!