



## Project Manager Training for XTRF

## ABOUT US

---



- Woman owned, agency based in Evanston, Illinois USA
- 50% of staff in Evanston
- Additionally we have remote U.S. team in Minneapolis, Seattle & Phoenix
- Global team in Egypt, Turkey, Mexico, Peru & South Korea
- Currently 22 full time staff with half of our staff in project management roles.



## OUR TRAINING

---

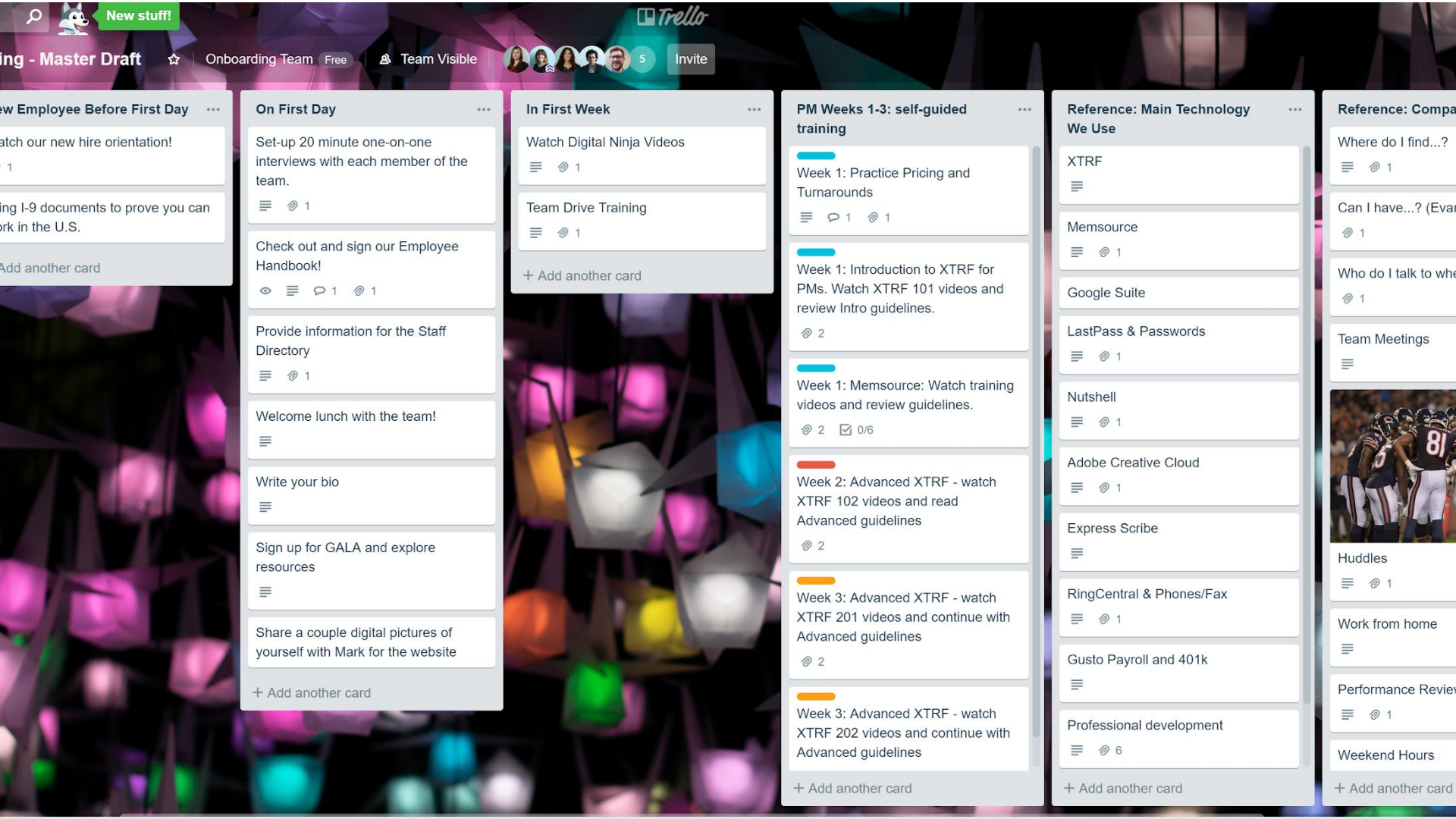
- Our training as evolved as our team has grown
- Our needs are also evolving as our team becomes more global
- We are not the experts on training, but feel we are doing better with every new hire
- Extensive documentation in Google Docs
- Many screencasts as well

## XTRF TRAINING AT MC

---

1. Before a PM starts
2. The new employee
3. Ongoing training





### New Employee Before First Day

Watch our new hire orientation!  
1  
Uploading I-9 documents to prove you can work in the U.S.  
+ Add another card

### On First Day

Set-up 20 minute one-on-one interviews with each member of the team.  
1  
Check out and sign our Employee Handbook!  
1  
Provide information for the Staff Directory  
1  
Welcome lunch with the team!  
Write your bio  
Sign up for GALA and explore resources  
Share a couple digital pictures of yourself with Mark for the website  
+ Add another card

### In First Week

Watch Digital Ninja Videos  
1  
Team Drive Training  
1  
+ Add another card

### PM Weeks 1-3: self-guided training

Week 1: Practice Pricing and Turnarounds  
1  
Week 1: Introduction to XTRF for PMs. Watch XTRF 101 videos and review Intro guidelines.  
2  
Week 1: Memsourse: Watch training videos and review guidelines.  
2 0/6  
Week 2: Advanced XTRF - watch XTRF 102 videos and read Advanced guidelines  
2  
Week 3: Advanced XTRF - watch XTRF 201 videos and continue with Advanced guidelines  
2  
Week 3: Advanced XTRF - watch XTRF 202 videos and continue with Advanced guidelines  
+ Add another card

### Reference: Main Technology We Use

XTRF  
Memsourse  
1  
Google Suite  
LastPass & Passwords  
1  
Nutshell  
1  
Adobe Creative Cloud  
1  
Express Scribe  
RingCentral & Phones/Fax  
1  
Gusto Payroll and 401k  
Professional development  
6  
+ Add another card































### Reference: Compa...

Where do I find...?  
1  
Can I have...? (Eva...  
1  
Who do I talk to wh...  
1  
Team Meetings  
Huddles  
1  
Work from home  
Performance Review  
1  
Weekend Hours  
+ Add another card

## NEW EMPLOYEES - FIRST THREE WEEKS

---

1. Supervisor gives PM walkthrough of XTRF
  - a. Basic functions
  - b. Views
2. Self-guided viewing of screencasts along with relevant documentation required
3. Colleague walkthroughs of full projects from start to finish
4. Data Hygiene
  - a. Client data
  - b. Vendor data (evaluation, rates, profiles etc...)
  - c. Project data management

Name ↑	Last modified
 01 XTRF 101 - First time logging in.mp4 	Aug 1, 2018 Katie Baumann
 02 XTRF 101 - Adding a client and quote.mp4 	Aug 1, 2018 Katie Baumann
 03 XTRF 101 - Project Part 1 - Setting up the Order, Languages, Process.mp4 	Aug 1, 2018 Katie Baumann
 04 XTRF 101 - Project Part 2 - Setting up the Files and Finance.mp4 	Aug 1, 2018 me
 05 XTRF 101 - Project Part 3 - Setting up People and starting the project.mp4 	Aug 1, 2018 me
 06 XTRF 101 - Project Part 4 - Assigning jobs and uploading final file.mp4 	Aug 1, 2018 me
 07 XTRF 101 - Project Part 5 - Completing the project.mp4 	Aug 1, 2018 me
 01 XTRF 102 - Deleting steps in a process.mp4 	Sep 7, 2018 Katie Baumann
 02 XTRF 102 - Adding steps in a process.mp4 	Sep 7, 2018 Katie Baumann
 03 XTRF 102 - Additional information on Process Templates and File Categories.mp4 	Sep 12, 2018 Katie Baumann
 04 XTRF 102 - Splitting jobs part 1.mp4 	Sep 14, 2018 Katie Baumann
 05 XTRF 102 - Splitting jobs part 2.mp4 	Sep 14, 2018 Katie Baumann
 06 XTRF 102 - Job instructions and payables.mp4 	Oct 5, 2018 Katie Baumann
 07 XTRF 102 - Sending job offers part 1.mp4 	Oct 5, 2018 Katie Baumann
 08 XTRF 102 - Sending jobs offers part 2.mp4 	Oct 5, 2018 Katie Baumann

## ONGOING XTRF TRAINING / DISCUSSION / COMMUNICATION

---

1. Periodic XTRF training when needed
  - Document new training, record new screencasts, share with team in meeting
2. Team discussions
  - Facilitate PM ideas, tips, best practices
  - Document discussions
3. Other communications
  - Periodic emails with tips and updates
  - Updated documentation
  - New and updated screencasts
  - Encourage the use of UserEcho... but update is limited by our PMs





Thank you!

Multilingual Connections  
[mlconnections.com](https://mlconnections.com)  
[contact@mlconnections.com](mailto:contact@mlconnections.com)  
877.292.5264