

Branch Correspondence Training Guide

30-Day Onboarding Framework (Trainer Version)

Purpose: Structured onboarding plan to train new Correspondence Officers in mailbox management, CLIFF, eApps, executive correspondence, and program coordination.

BEFORE START DATE (Preparation Phase)

System Access & Setup

- Assign mailbox category (colour-coded)
- Assign correspondence agent number
- Arrange headset (Luke Oldfield)

Calendar & Coordination

- Share trainer Outlook calendar
- Request trainee Outlook calendar access
- Schedule Week 1 training sessions + weekly 1:1s

System Access Requests *(send once hire is announced)*

- RSBC mailbox (Luke Oldfield)
- Driver's / Virtella (MXM) access (Luke Oldfield)
- Mercury (Mark Baird)
- CLIFF access (Michael Perez de Tagle)
- eApps access (Michael Perez de Tagle)
- Add to RSBC Correspondence eApps group (Jill)
- VIPS access (Client Services)
- PSSG email distribution list
- CLIFF notifications setup (SG assignment emails)
- SharePoint access (Comms Team)
- OneNote access
- LAN access (Corporate Priority)
- HR onboarding (IDIR, time & leave, PDP setup)

Training Prep & Admin

- Prepare onboarding manual + training links
 - Send welcome email (expectations + resources)
 - Book meet & greets (PSSG, CS, Admin, DMF, etc.)
 - Arrange Plain Language training (Learning Hub)
 - Schedule Comms Team meeting invite
 - Confirm vacation/time entry process expectations
 - Invite to Corr Community of Practice
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WEEK 1 — FOUNDATIONS (Mailbox + Systems)

Focus: Core systems + mailbox fundamentals

Orientation Session

- Welcome session (Teams)
 - Review role expectations + communication norms
 - Walk through onboarding plan + resources
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Systems Training

- CLIFF training (create logs + workflow tracking)
 - Mercury + Driver's/Virtella intro
 - eApps overview + basic navigation
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Mailbox Training

- Assign Session 1–2 videos (Foundations + Mailbox basics)
 - Guided drafting practice (supervised responses)
 - First live response completed together
 - Begin mailbox observation + triage exposure
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Check-ins

- Weekly 1:1 (progress + confidence check)
 - Review Sessions 1–2 understanding
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WEEK 2 — MAILBOX OWNERSHIP

Focus: Independence building

- Transition mailbox responsibility to trainee
- Monitor triage accuracy + response quality
- Provide coaching + correction as needed
- Reduce hands-on support gradually

- Schedule Week 3 training sessions

Expected outcome:

Trainee independently manages mailbox with supervision

WEEK 3 — EXEC / SG + eApps INTRODUCTION

Focus: Complex correspondence + workflow systems

Training Content

- Exec & SG drafting (Sessions 3–4 videos)
 - Sending responses (Session 5)
 - eApps full workflow (create → route → close)
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Practical Work

- Draft Exec/SG responses (reviewed)
 - Create and process practice eApps
 - Feedback cycles on accuracy + tone
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Check-in

- Teams review of Exec/SG + eApps workflows
 - Clarify escalation triggers + approval expectations
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WEEK 4 — SUPPORTED INTEGRATION

Focus: Real-time application

- Trainee manages full mailbox workload
 - Introduce live Exec/SG items as they arise
 - Monitor closely (quality + compliance)
 - Provide real-time corrections + coaching
 - Begin stepping back gradually
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WEEK 5 — FULL INTEGRATION

Focus: Independent operation

- Confirm full workload independence
- Balanced workflow established:
 - AM: eApps
 - PM: mailbox management
- Minimal supervision (as needed only)
- Introduce stretch tasks:
 - Language library updates
 - Process improvements
 - Documentation support

Outcome:

Trainee operates independently across systems and workflows

TRAINER RESPONSIBILITIES (ONGOING)

- Assign and track training videos
 - Use weekly 1:1s for coaching + feedback
 - Reinforce real-case learning
 - Gradually increase responsibility
 - Monitor accuracy in CLIFF + eApps
 - Support escalation judgment development
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CORE SYSTEM RULES (MUST FOLLOW)

- CLIFF = logging + accountability tracking
 - eApps = workflow routing + approvals
 - Mailbox = intake + triage + response
 - LAN = official document storage
 - Templates = mandatory consistency standard
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SUCCESS CRITERIA (END OF ONBOARDING)

Trainee can:

- Independently triage 400–450 monthly mailbox items
- Log and close items correctly in CLIFF
- Create and manage eApps end-to-end
- Draft Exec/SG correspondence using templates
- Navigate approval and escalation routes
- Apply correct LAN filing standards
- Distinguish RoadSafetyBC vs external ministry responsibility