**Nesting Process Criteria**

This document will list key components and aspects that should be performed and maintained for each week of the 4 weeks of nesting. Being able to follow this list helps ensure that there are no issues with getting the nesters “spun up” for production and can otherwise help show any potential areas that could be improved with the overall training process.

**Pre-Nesting/Overall**

* There should be a trainer/SME available for every 3-4 nesters. If permanent assistance is needed, or temporary assistance is needed, the following reps are known for their ability to explain and assist others well. The managers of the representatives/SMEs as well as the representative/SME themselves should be notified beforehand as much as possible should someone be wished for assistance, be it permanent or temporary, so discussion and arrangements can be made. This should minimally be 2 weeks before nesting begins.

Should these representatives/SMEs be chosen, they should be advised to emphasize on helping the nester learn/determine what they are doing is right and wrong, more so than focusing on resolving the customer’s issue. These representatives/SMEs are not listed in any order.

|  |  |  |  |
| --- | --- | --- | --- |
| Alex King | Frank Gori | Lee Balentine | Dan Southern |
| Dan Gifford | Tom Welderly | Sam Bogardus | Roxanne Armstrong |
| Dan Parsons | Colin Lucey | Ben Taylor | Meredith Couture |

1) How many nesters are there \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

2) Is more permanent assistance needed beyond the trainer? Y / N

Why? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Who is wished to be available to help: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Has management and representative approval been given? Y / N

* Nesting has, historically, ran between 10am and 6:30pm EST Monday-Friday. This gets the nesters availability for tickets during our peak hours for tickets, thus providing them the best range of tickets that can be assigned to help build their skills. This should be notified to the class at least 2 weeks before the end of nesting

1) Has the training class been notified when nesting begins, and the shift in nesting hours? Y / N

2) Has the training class been reminded during the 2nd to last week, and last week of nesting? Y / N

3) Are there any issues with the trainees being moved to that time for nesting? Y / N  
 If so, describe below:

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* As the first week of nesting occurs in the classroom, we will need to determine where we will want the nesters out on the floor for further nesting. This should be provided as early as the last week of training. This information will need the username and hostname/IP of the computer associated with the trainee, and the cube number on the floor that they are desired to be moved to per the trainer. This information needs to be worked out with Will Hofferbert.

1) Has Will Hofferbert been notified of what cubes the nesters are to be moved to during the last week of training? Y / N

If there are any issues, please describe below:

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* At the end of each week, a notification email should be sent to the trainer and to each member of management. This notification email should advise of any strengths/weaknesses, quirks/habits, praises/worries, etc. associated with each of the nesters. This email is used so the managers will have more information to better address any concerns that could arise with the nesters when they join the production floor, as well as how to best utilize them once they become a member of their team. This message can be created by the permanent assistance, or by the trainer themselves.

1) Was a email created for week 1? Y / N Week 2? Y / N Week 3? Y / N Week 4? Y / N

**Week 1 (Dates: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_)**

* Week 1 occurs in the classroom where they have been seated. This helps the nesters feel more calm as they shift into working tickets by working in an environment they are familiar with.
* The tickets that should be assigned should be similar in nature to the below issues whenever possible:
  + Non T1/T2 hosted only (or confirmed remote access) non P1s
  + Filter log hunts
  + Spam/TAP related issues
* The entire 1st week, the trainer and/or permanent assisting representative/SME should be assigning tickets to the nesters. This helps ensure that there are less “curve balls” that are presented to the nesters, so they can feel more confident and less stressed about their workload. At the start of Week 1, an email should be sent out to Nina Cox and the Proofpoint distro group “x-l1-triage” advising the full names of the nesters as they appear in SalesForce. This should also advise that they would begin assigning out tickets starting on Monday of week 2 of nesting, as well as a description of what type of cases would be preferred to be assigned to the nesters

1) Has the FLS team been advised to assign tickets to the nesters starting Monday of week 2? Y / N

* For the first day, going as long as needed, the nesters should have their customer facing verbiage reviewed before it is sent to the customer. This is to ensure that they are using the appropriate level of response as expected for the role. If there are no issues, the nest can be advised that they can update the case without having the case checked. If there are issues, the issues should be advised of and explained how/why the proper grammar/explanation should be used.

1) By close of class Friday, are there any nesters who are having issues with their written communication? Y / N

Who is having the issue?

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* Nester WIPs should be slowly increased throughout the week to help prepare them for when they are out of nesting. WIP assignment should attempt to follow the below progression:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Monday | Tuesday | Wednesday | Thursday | Friday |
| 1 WIP | 1-2 WIPs | 2 WIPs | 2-3 WIPs | 3 WIPs |

1) Are there any issues with WIP assignment? Y / N  
 If so, describe below:

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* Starting at earliest Tuesday, preferably Wednesday (time dependent on how many nesters there are), the nesters should be taken 1-on-1 to work with a member of Triage. The trainer should attempt to schedule this out in 1-2 hour blocks for each nester.  
    
  The Triage member will should briefly describe what Triage is to the nester, and the importance of the Triage team. This Triage member should work through 2 tickets with the nester. Both tickets should be on a semi equivalent level of what the nesters are working on, but more noticeably for the 2nd ticket that the nester works on. For the sake of these tickets, these can be grabbed from anywhere within the T1/T2 queue.   
    
  The 1st ticket, the Triage member works on. While working on it, the Triage member details everything they are doing, how/why they are doing what they are doing, etc. This includes investigating the customer’s issue, the notes performed and added to the case, the resources utilized to investigate the issue, and the wording used in the customer facing verbiage.  
    
  The 2nd ticket, the nester should work on with the Triage member assisting them with the ticket. The Triage member should ask the nester guiding questions throughout the entire process (ex: “What is the customer asking for?” “What information do we have to look into this issue?” “How do we go about looking into that?” etc). The Triager should be having the nester perform most to all, if not every aspect of working on this case including notes and customer facing verbiage. The Triage member will ensure that what is being included/provided is at an appropriate level for the Triage team (both for notes and for verbiage), making any changes as needed and being sure to describe why those changes are being made.  
    
  Once both tickets are completed, the nester should be sent back, and they should be IM’d the links to the cases they were working on by the Triage member so they can note down information from the case appropriately.

1) If utilized, can the permanent representative assistance provide this function? Y / N

2) If the answer to the above question was no, has management and representative approval been given AND has a tentative schedule been given out on which nester would be working with a Triage representative at a time? Y / N / Not Applicable

* For the last hour of each day during week 1, a debrief should be attempted. This debrief will have the nesters advise of new/interesting things that they have discovered with the tickets they are working on. This activity helps the nesters be able to describe what they have worked on, recall what they have learned, and learn from the other nesters.  
    
  If possible, the trainer or permanent assistance should begin each debrief with going over an aspect of the job that might not have been described much during training. This can range to walking through other resources (such as Nagios or MTS), to resolution of common ticket types (such as safe/block list entrys or TAP URL Rewriting options), to a guided look through common “scary”aspects of the product (such as the filter.cfg, or domain-noexist), and anything else that feels relevant based on what has been worked on.  
    
  During the debrief on Friday, the nesters should be brought out to the floor so they know what computer they will be working on at the start of week 2. They should also be advised that we will be having them make outbound calls the following week.

1) Has there been any issues with having these debriefs occur consistently? Y / N

If so, what could be done to help these debriefs occur?

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2) Were the nesters advised/shown of where they will be sitting at the start of Week 2? Y / N

* By the end of week 1, one of the coaches should perform a QA on one of the nesters cases. If there are any noticeable/worrisome issues from the QA, the trainer should be notified so an appropriate quick stop coaching can occur to improve the behavior

1) Have coaches been reminded early Wednesday to perform a QA on each of the nesters by the end of the week? Y / N

2) Was a QA received for each nester by the end of week 1? Y / N

**Week 2 (Dates:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_)**

* At the start of week 2, the nesters should be in the nesting area of the floor. As the nesters get setup with their desks, it can be a good time to ensure that they have no issues logging into TalkDesk. Give each nester their Talkdesk logins, and ensure they all sign in. When they sign in, ensure they move to the “Working Or P1” status. The reason for this status is once everyone is up, you should practice having all of the nesters warm transfer a call to each other. In order to perform this test, each nester will need to receive their Jabra headset.

1) Were there any issues with the move of the nesters’ images? Y / N

2) Were there any issues with the nesters logging into Talkdesk? Y / N

3) Was warm transferring tested with the nesters using Talkdesk? Y / N

* The tickets that should be assigned should include those from last week. The nesters can begin working on P2 cases. Additionally, cases similar in nature to the below issues can be assigned:
  + Mail Delays
  + User Import related issues
  + General Errors
* Early in the week, nesters should be advised of the Bad News training. This can be given by Colleen Shea, or by utilizing the delivering bad news document. As they begin to work on harder tickets, they will be increasing the chance that they will have to tell a customer bad news, so they should be informed how to tell a customer bad news. This will work well with the below point when they attempt to make outbound calls as well

1) Have the nesters been advised of Bad News training? Y / N

* Nesters should begin attempting to call customers with outbound calls. The first time this occurs, the trainer/assistance should help the nester mentally prepare themselves before they make the call (do they have all the information they need, do they know what they will do one they get the information, how will they respond to leaving a voice mail, etc). Each nester should have at least 2 outbound calls by Thursday and calls with at least 2 separate people y-corded on the call. If there are no worries/concerns on these calls, the nester can be outbound approved, meaning they can make outbound calls of their own accord. With this, they can be assigned cases where there is no remote access available.

1) Has FLS been advised to assign out “simple” outbound call cases? Y / N / Not Needed

2) Was each nester able to have 2 outbound calls by Thursday? Y / N

If not, list below who still needs to make these calls

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

3) Is each nester outbound approved by the end of the week? Y / N  
 If not list below who is not approved, be sure to include this detail in the weekly email

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* With the outbound calls, nesters should also know how to login to WebEx and Zoom, and how to open/participate in a session. Each nester should have experience utilizing these tools and creating a session for the trainer to join. This can work well before or after the outbound call (depending on if there is remote access or not).

1) Have the nesters had practice with WebEx/Zoom? Y / N

* Nester WIPs should be slowly increased throughout the week to help prepare them for when they are out of nesting. WIP assignment should attempt to follow the below progression:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Monday | Tuesday | Wednesday | Thursday | Friday |
| 3-4 WIP | 4 WIP | 4-5 WIP | 5 WIP | 5-6 WIP |

1) Are there any issues with WIP assignment? Y / N  
 If so, describe below:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
  
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* A QA should be performed by Shane (the Quality Manager/Analyst) for each of the nesters. This should occur before the end of the week. This provides a separate set of eyes on their tickets, and allows the nesters to be acquainted with the QAs they will receive while on production.

1) Has Shane been able to perform a QA for each of the nesters by the end of the week? Y / N

* Debrief meetings should be attempted with the nesters during the week preferably 2-3 times, and at least on Friday. These can be start of day or end of day, dependent on ease of getting everyone at once. These meetings should have the nesters talk about tickets that they have worked on as well as ask any questions they may have. These should also continue to advise aspects of the job as they have in the past, which can be made more poignant based on the cases the nesters have been working on. During the Friday debrief, the nesters should be advised that they will be attempting to take inbound calls next week and may begin seeing NOC P1s.

1) Were the nesters able to at least have the Friday debrief? Y / N

**Week 3 (Dates:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_)**

* At the start of the week, nesters should be advised of queue management. With their WIPs continuing to increase, and their priority tickets being more varied, they will need to know how to balance their queue.

1) Have nesters been advised of queue management? Y / N

* The tickets that should be assigned should include those from last week. Additionally, cases similar in nature to the below issues can be assigned:
  + NOC P1s
  + Digest related issues
  + Encryption related issues
* All nesters should be outbound approved by Wednesday. If there are continued issues throughout the week, TMs need to be notified so a coaching plan can be put together.

1) Are any nesters not outbound approved? Y / N  
 If so, list them below

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Have the TMs been notified for a coaching plan to be used? Y / N

* Nester WIPs should be slowly increased through the week to help prepare them for when they are out of nesting. WIP assignment should attempt to follow the below progression:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Monday | Tuesday | Wednesday | Thursday | Friday |
| 6 WIP | 6-7 WIP | 7 WIP | 7-8 WIP | 8 WIP |

1) Are there any issues with WIP assignment? Y / N  
 If so, describe below:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
  
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* By the end of the week, each nester should have 2 inbound calls that they have been y-corded on. They should also have at least 2 separate people y-cord to their inbound call. If there are any issues seen, they should be noted of. As long as there are no issues or concerns, the rep should be marked as inbound approved. Inbound approved reps should try to take a non-y-corded inbound call on Thursday, and 2 non-y-corded inbound calls on Friday

1) Were each nester able to have 2 inbound calls by Thursday? Y / N

2) Are all nesters inbound approved by Friday? Y / N

If not, detail who is not approved below and include in weekly email

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* Reporting TMs for the nesters should perform 2 QAs and have at least one of those be a 1-on-1 with the nester. This helps build the relationship between the nester and their manager once they are out of nesting.

1) Were nesters able to have 2 QAs from their manager performed this week? Y / N

2) Were nesters able to have 1-on-1 time with their manager to discuss at least 1 QA? Y / N

* Debrief meetings should be attempted with the nesters during the week preferably 1-2 times, and at least on Friday. These can be start of day or end of day, dependent on ease of getting everyone at once. These meetings should have the nesters talk about tickets that they have worked on as well as ask any questions they may have. These should also continue to advise aspects of the job as they have in the past, which can be made more poignant based on the cases the nesters have been working on. During the Friday debrief, nesters should be advised that the following week, they will be treated very closely to being on production, so they should be sure to utilize assistance as needed.

1) Were the nesters able to have at least the Friday debrief? Y / N

* With nesting coming to a close soon, the nesters should ensure that they will have a desk to move to once nesting is completed. This helps ensure that the nesting area is open for the next nesting class, and ensures that the nesters will be near their peers who can assist them once nesting is completed. This conversation will need to involve all of the TMs and Will Hofferbert. It should advise the desk the nester is currently at. In theory, the TMs should determine what desk the nesters will be moved to during the week and/or next week.

1) Has an email been sent to TMs and Will Hofferbert on Monday to begin scheduling the nester desk moves? Y / N

**Week 4 (Dates: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_)**

* The nesters should feel free to be assigned most any tickets. If any ticket seems exceptionally “nasty” (ex: a really complicated in depth issue, or a really bad legitimate P1) it should attempt to go elsewhere, but all cases can be assigned, including P1s, and Triage completed T1/T2 cases.
* At the beginning of the week, the nesters should be advised how to escalate cases, and should be made familiar with the wiki on how to escalate cases. With them receiving more complicated issues and P1s this week, they should hopefully have to escalate a case by now. This should also include discussion on an inbound warm escalation to Backline. Any and all escalations the nesters make should receive trainer/assistant approval before it is escalated.

1) Have the nesters been advised how to escalate cases? Y / N

2) Have the nesters been added into the HipChat room of “Case Transfers”? Y / N

* Nester WIP at this point can be increased, or can remain the same. The primary aspect to determine this is to see where the rest of the L1 floor is at with WIPs. If the floor has WIPs at 8, keep the nesters at 8. If it is higher, continue to increase WIPs at the same rate (0.5 WIP a day) as has been occurring during each week until the floor’s average WIP amount has been met.

1) Are there any issues with WIP assignment? Y / N

If so, describe below:

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* Nesters who are inbound approved should be having 2 hours of auto-in time on Monday, and should be trying to get as close as possible to full shift auto-in time on Friday. This could be done with a progression of 2 2 4 4 8, or 2 3 4 6 8, or any other combination. If there are any issues with having someone inbound approved by Wednesday, TMs need to be notified so a coaching plan can be put together.

1) Are any nesters not inbound approved? Y / N

If so, list them below:

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* During this week, the TMs need to verify what desks the nesters will move to at the end of nesting. Any scheduling that may need to occur also needs to be finalized so the nesters can be notified as it gets closer to the end of the week.

1) On Monday, have the TMs determine what desks the nesters are moving to? Y / N

If No above, determine the desks for nesters to move to and give TMs until Wednesday to disapprove. If there are no disapprovals, advise Will Hofferbert to have the images moved from their current desk number, to their new desk number.

* Shane should perform 1-2 QAs for each nester by the end of the week. This helps ensure that there are no major concerns seen with the nesters, and gets them accustomed to them seeing Shane perform their QAs.

1) Has Shane performed QAs for the nesters during the last week? Y / N

* As the nesters finish up nesting, Steve Leyro should speak with the nesters about how commission will work. This may have been discussed before hand (such as the last week of training), but as they leave training and nesting behind, being reminded about the metrics/values of their commission will be more relevant and make more sense to the nesters.

1) Have the nesters been advised how commission will work and when it will affect them? Y / N

* Unless needed otherwise, there should only be a single debrief on Friday. This could be a potluck and/or pizza party celebration for the last hour if time/progression allotment is there. Be sure to check with Steve throughout the week should food desired to be purchased, as it can likely be performed with monthly engagement money.   
  Regardless on if there is a “celebration”, it is still advised to have this final debrief. During this debrief, the nesters should try to advise what they found the most interesting/amusing/confusing and share it with the class. This is also a prime time for a heart-to-heart with the permanent assistants to advise any recent tribal knowledge, or provide any “here’s how it really is” explanations for procedures (ex: advising irate customers will occur and how to deal with them, lack of product documentation when a new feature/product is released, etc). During this time, the nesters should also be reminded of what their shift days/times will be, and what desk they will be seated at.

1) Has the final debrief occurred? Y / N

2) Have the nesters been advised of their shift times and desk moves? Y / N