


New Hire Orientation

Welcome

Presenter Name



Agenda

Welcome to the Family!

- 01 Intro
- 02 Getting to Know You
- 03 About Us
- 04 Guiding Principles

Setup for Success

- 06 People Partner
- 07 Tech Tools
- 08 Important Policies

2

- Introduce facilitators
- Give a quick overview of the agenda.
- Housekeeping items (restroom, breaks, asking questions)
- Talk about the breakout groups at the end.
- Point out the Teammate Resource Guide and the handouts to be covered later.

DAI | DATA ANALYSIS
INCORPORATED

Welcome to the Family!

Our Founder, William J. O'Neil

One of the true great American success stories

1950's

- 1958 Stockbroker with Hayden, Stone & Company.

1960's

- 1963 founded William O'Neil + Co. Incorporated

1970's

- 1971 Published *The Model Book of Greatest Stock Market*
- Copyrighted Datagraph™
- 1973 founded O'Neil Digital Solutions

1980's

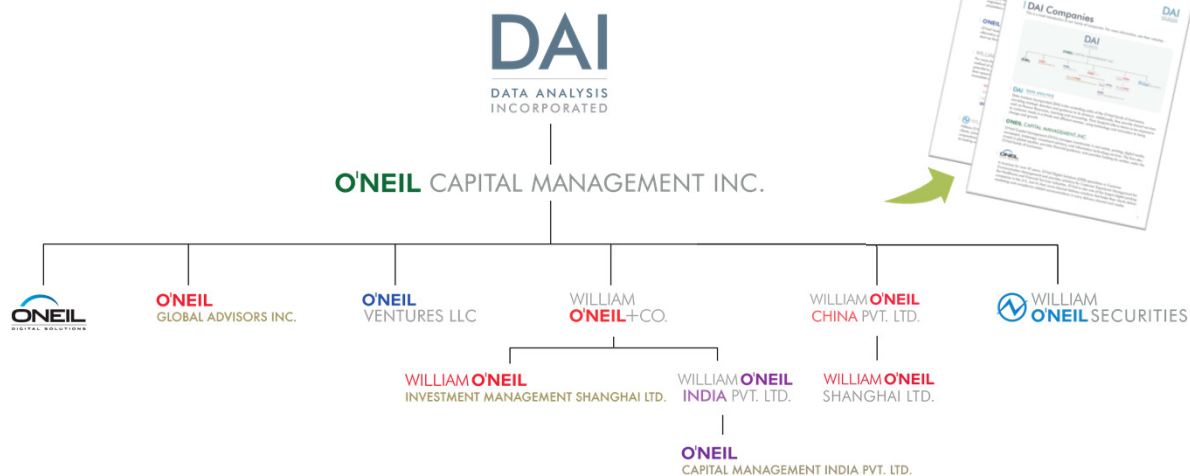
- 1984 Launched Investor's Business Daily®

2000's

- 2010 Expanded with William O'Neil India Pvt Ltd
- 2015 with William O'Neil China
- 2019 O'Neil Global Advisors, O'Neil Capital Management India Pvt. Ltd., and William O'Neil Investment Management Shanghai Ltd

- **William J. O'Neil is one of the true great American success stories** – the foundation of our heritage for the O'Neil family of businesses.
- 1950s [CLICK]
 - Mr. O'Neil **began his career as a stockbroker in 1958 with Hayden, Stone & Company.**
- 1960s [CLICK]
 - 1963 Branching out on his own to **founded William O'Neil + Co. Incorporated.**
- 1970s [CLICK]
 - 1971, he **published his knowledge in *The Model Book of Greatest Stock Market Winners*.**
 - 1972, he **copyrighted Datagraph™** to capture all the relevant information needed to make a stock investment decision.
 - 1973, he **founded O'Neil Data Systems, Inc. (ODS), now O'Neil Digital Solutions**, a high-speed printing facility **that pioneered the field of database publishing** using state-of-the-art computer technology.
- 1980s [CLICK]
 - 1984 **Launched Investor's Daily (later Investor's Business Daily®)**, a newspaper for investors
- 2000s [CLICK]
 - 2010 To further DAI's global reach and bring its unique investing style to Asia, **expanded with William O'Neil India Pvt Ltd and in 2015 with William O'Neil China.**
 - 2019, DAI used its expertise and experience in machine learning and AI to **branch out into robo-advising** to develop algorithms that identify investment strategies with the **founding of O'Neil Global Advisors, O'Neil Capital Management India Pvt. Ltd., and William O'Neil Investment Management Shanghai Ltd.**

Our Companies



4

Data Analysis Incorporated (DAI) is the controlling entity of the O'Neil family of businesses

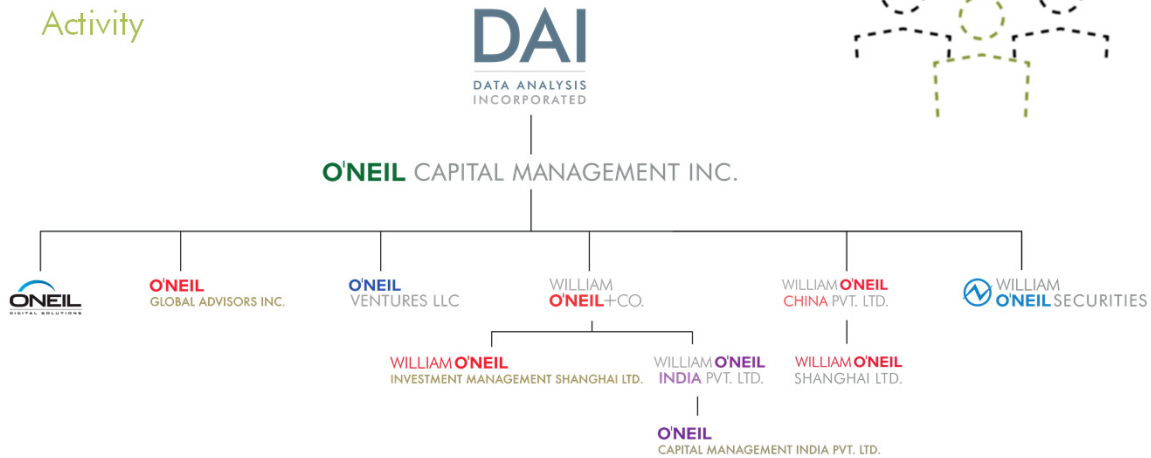
- provides strategic direction and guidance to its divisions
- provides shared services such as Human Resources, Learning and Accounting
- Their footprint allows teams to be responsive to customer needs in a timely and efficient manner, using technology and innovation to bring change and growth.

[CLICK]

- *A breakdown of each company is listed in your Teammate Resource Guide.*
- *You will also learn later how you can access your specific org chart from the Success Factors platform*

Where do you fit in?

Activity



5

Facilitator note: Please remind attendees how happy we are that they are joining DAI and how we are excited to see the value they will bring.

Let's take a moment to learn which company you will represent and what your new role will be.

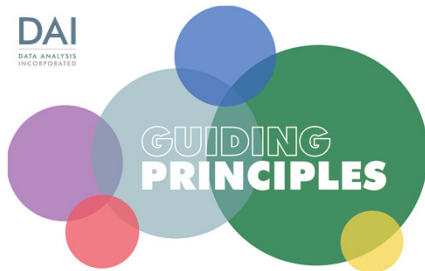
- Ask attendees to say their name, which company they will work for, their new job title, what experience/expertise they bring to the role.
- If a larger group, have people break into partners and ask each other and then report out after a few minutes
- Thank attendees for sharing



As a new member of the team, we would like to introduce to you our Guiding Principles. To kick us off, you will hear from the son of William J. O'Neil, our CEO, Scott O'Neil.

[Click to play]

Guiding Principles

**Powered by people always doing the right thing.**

Bill O'Neil built the company's reputation on integrity – it is our responsibility to continue that legacy.

**We are constantly evolving.**

Our business has evolved for the last six decades through innovation, and we are ready for more.

**We embrace complexity.**

Data is messy. We cut through the chaos instead of retreating from it.

**We succeed by building powerful teams where everyone can realize their full potential.**

Everyone has something to contribute and should feel welcome and included in their team.

**Our approach is intentional, flexible, and biased toward action.**

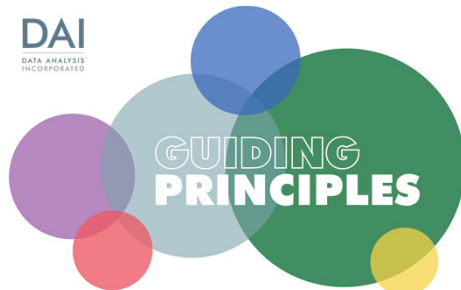
We think strategically and pivot intelligently to achieve our goals.

**We carve our own way and have since the beginning.**

Our ability to innovate and seize opportunities has made us a market leader.

- [Click] to progress through each Guiding Principle.
- Facilitator note: You can read through these without adding additional narrative as it may get long with the Activity and closing video from Scott O'Neil.
- Mention that they may want to pay attention because there will be a fun activity to test their knowledge coming up!

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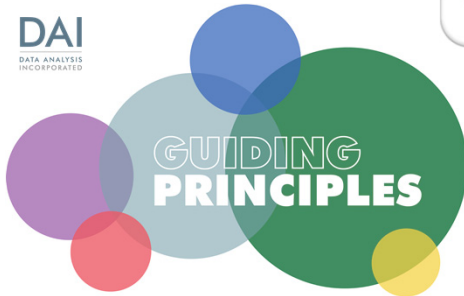
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[CLICK] and read each principle

Guiding Principles

DAI
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9



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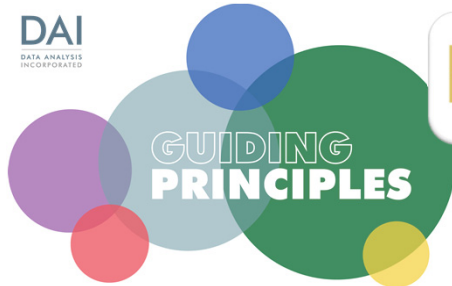


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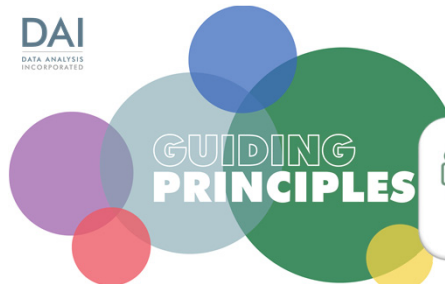
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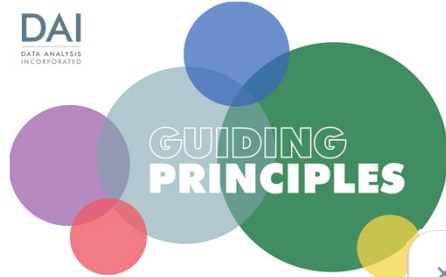
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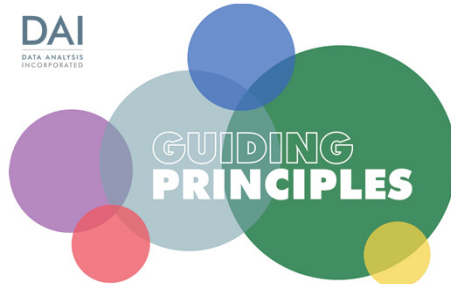
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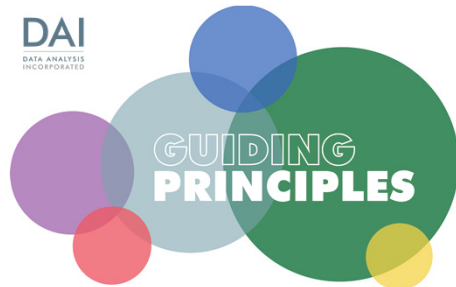
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[CLICK] and read each principle

Which Guiding Principle?

Activity



Despite being new to the company, Bob has excelled and helped develop other teammates' skills. Additionally, he generated new ideas to either improve our current process or created an entirely new method to increase the efficiencies.

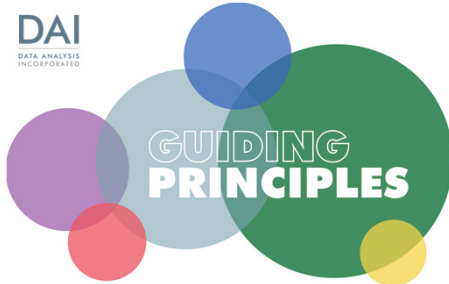


- Read the quote and have attendees guess which Guiding Principle it represented.
- Show attendees the page to reference in their Teammate Resource Guide or other swag item within binder
- [CLICK] to reveal

Guiding Principles



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Bob Guan
ODS, Los Angeles
Senior Accountant



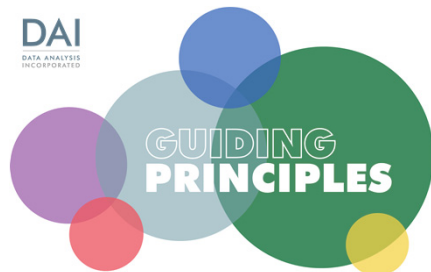
Despite being new to the company, Bob has excelled and helped develop other teammates' skills. Additionally, he generated new ideas to either improve our current process or created an entirely new method to increase the efficiencies.



- Read the winner's name, company and title.
- [CLICK] to proceed

Which Guiding Principle?

Activity



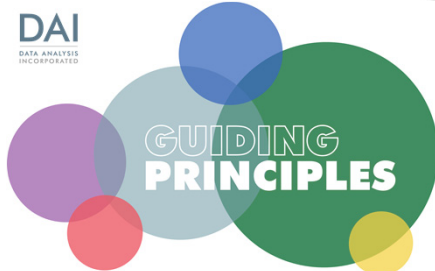
Akhila never compromises on getting things done in the right way! She always instructs and guides me to complete any task in compliance with the company's rules and regulations and never deviates from this commitment.



Now, let's see our Guiding Principles in action.

- Read the quote and have attendees guess which Guiding Principle it represented.
- Show attendees the page to reference in their Teammate Resource Guide or other swag item within binder
- [CLICK] to reveal

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Akhila Arjunan
WON, India
People Manager



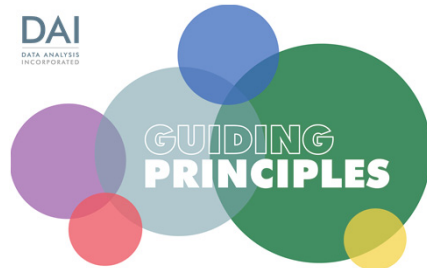
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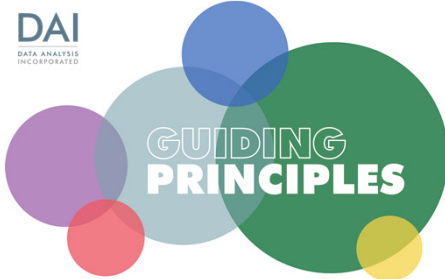


Even as complexity and volume increased, Iffy maintained his positive attitude and thoughtfully approached each change before acting. With limited resources, he was able to deploy new features while maintaining his relationship and communication with the client team and clients.



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- [CLICK] to reveal

Guiding Principles



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Ifeanyi "Iffy" Agolua
ODS, Plano
Business Systems
Analyst III



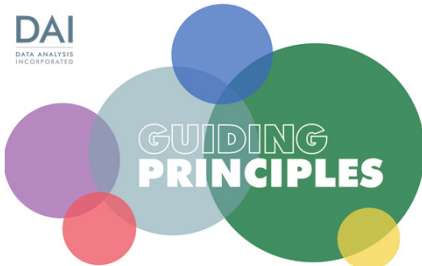
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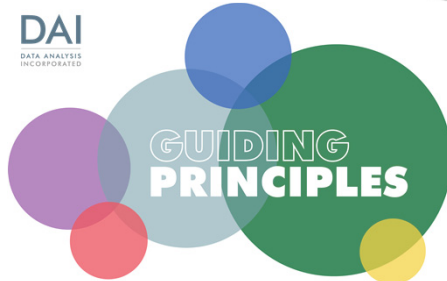


Merry was the first user of the Jeppesen Refactor User Interface and has contributed many ideas successfully added to the user interface. Enhancements include automating job ticket due dates, auto-populating shipping expediting instructions, and more.



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- [CLICK] to reveal

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Merry Gaskill
ODS, Plano
Sr. Client Advocate



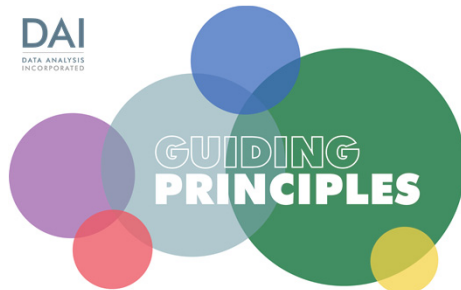
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- [CLICK] to proceed

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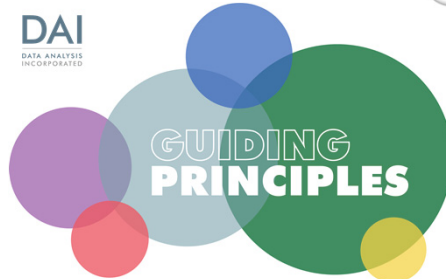


Tony takes time to explain the processes and procedures and gives every opportunity to gain hands-on experience. He provides suggestions and solutions and thinks about the details from start to finish. He always is willing to help regardless of the other tasks he might have for that day.



- Read the quote and have attendees guess which Guiding Principle it represents.
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Guiding Principles



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Anthony Tally
ODS, Los Angeles
Senior Production
Planner



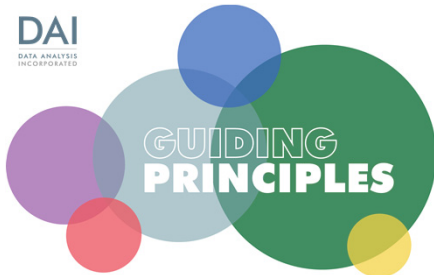
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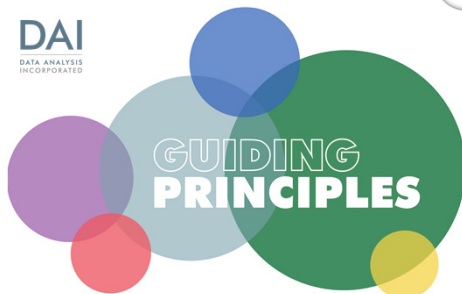


Victor consistently maintains an open mind in his approach. He seeks out information and understanding. With continuous feedback and collaboration, he strives to maximize efficiency and effectiveness in his role and the team as a whole.



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- [CLICK] to reveal

Guiding Principles



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Victor Ramos
ODS, Los Angeles
Insert Operator II



Victor consistently maintains an open mind in his approach. He seeks out information and understanding. With continuous feedback and collaboration, he strives to maximize efficiency and effectiveness in his role and the team as a whole.



- Read the winner's name, company and title.
- [CLICK] to proceed



- Mention here that this will be an ongoing program, quarterly incentives and your chance to get involved in building the culture of the DAI family.



- Introduce attendees to the role of their People Partner
- Briefly list some of the ways they can help
- Point to the People Partner page in the Resource Guide
- Show attendees how to find out who theirs is and write it in their Guide
- OR, should we have pictures of all of the people partners here??
- Could this be an intro to Ximena and benefits?



The DAI family of companies is committed to providing a safe environment.

Social Distancing [CLICK]

- Stay 3 to 6 feet away from others as a normal practice
- Eliminate contact with others, such as handshakes or hugs
- Avoid touching surfaces touched by others, to the extent feasible
- Conduct group meetings whenever possible via Zoom or teleconference

Face Coverings [CLICK]

- Face coverings being worn always except in the following situations:
- You are alone in your workspace AND at least 6 feet away from others or separated by a barrier (i.e. wall, closed window, door)
- You are outside the building and at least 6 feet away from any other person

Note: If you have been fully vaccinated and it has been 10 days since your last vaccination you will be able to get a Covid Vaccine Buddy and be able to remove your mask.

Wellness [CLICK]

- If you are not feeling well, please notify your manager BEFORE coming into the building
- Flyers are posted throughout the facility for COVID protocol reminders
- Hand sanitizer stations have been installed throughout the building.
- Additional cleaning crews are on-site to maintain a clean environment

Technology Overview

The following are a snapshot of our most frequent software tools. Depending on your company, division, and role, your go-to's may vary.

Find this helpful list in your **Teammate Resources** binder.

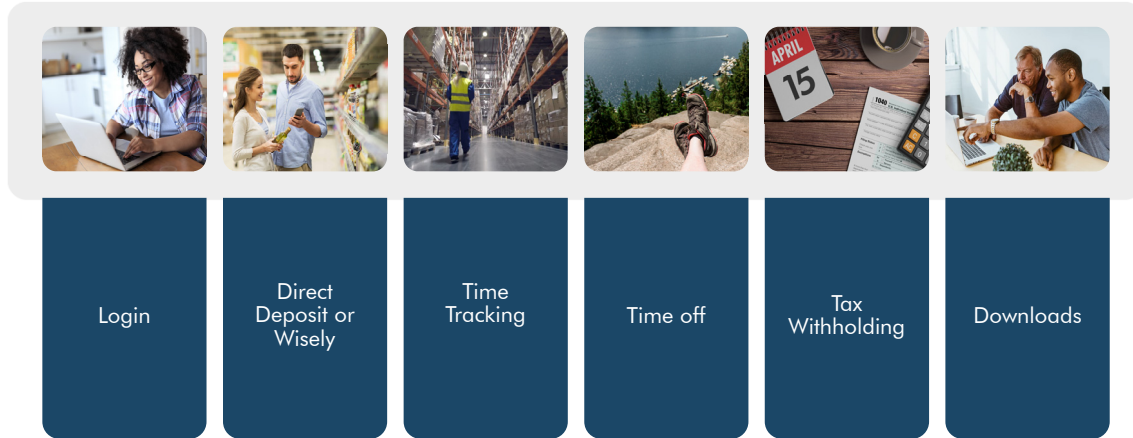


29

- Mention here that there is a snapshot of the most commonly used tech in the Teammate Resource Guide and we will dive into a couple in the upcoming slides.
- Ask for a show of hands to see who has worked in the listed platforms.

ADP Self-Service Portal

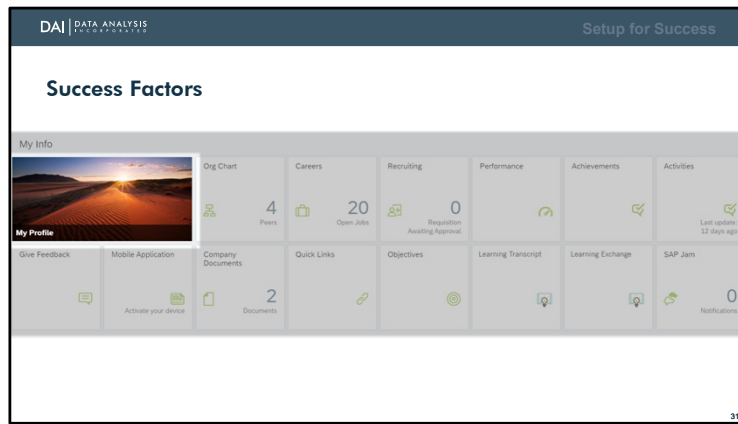
This platform allows employees to record work time, access pay records and enroll in benefits.



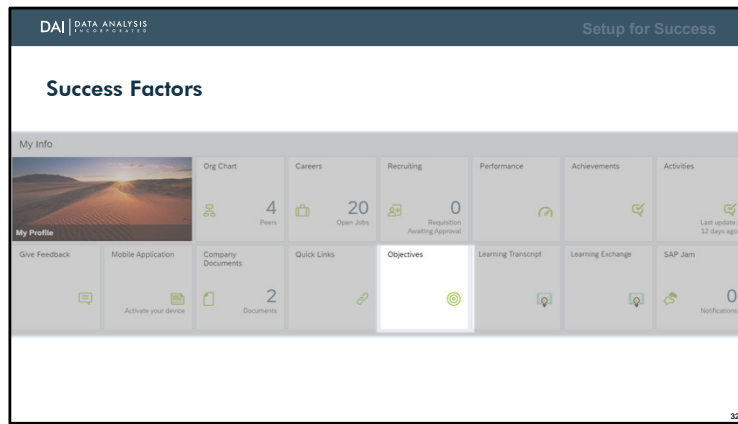
30

Introduce the ADP Self-Service portal

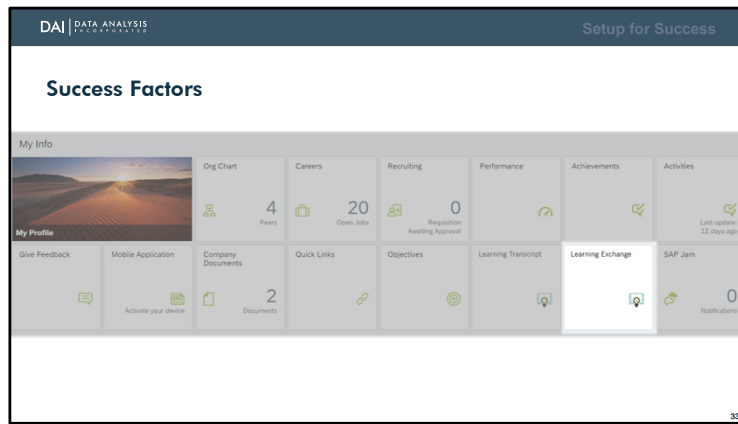
- [CLICK] through each item and give a brief overview
 - Login
 - Direct Deposit or Wisely
 - Time Tracking
 - Time off
 - Tax Withholding
 - Downloads (tax forms, pay stubs)
- Always refer back to the Resource Guide
- If time, show them the page where they can reach out to their People Partner with questions



- Guide attendees through important tiles in Success Factors
- What is Success Factors?
- Let attendees know they can access specifics on login in their handbook and encourage them to take notes in their Resource Guide as they wish!
- Start with MY PROFILE section
 - What happens here? When do I have to do this?
- [CLICK] to move to each section



- Discuss Objectives tile
- What happens here? When do I have to do this?



- Discuss Learning Exchange tile
- What happens here? When do I have to do this?
- [CLICK] Next slide introduces Learning Exchange

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Setup for Success

Learning Exchange

With over 6000 courses, and a built-in social platform, you'll uplevel your skills and have a transcript to prove it.

COURSES & PATHWAYS

Project Management

Process Improvement

Active Listening

Find in your **Teammate Resources** binder.

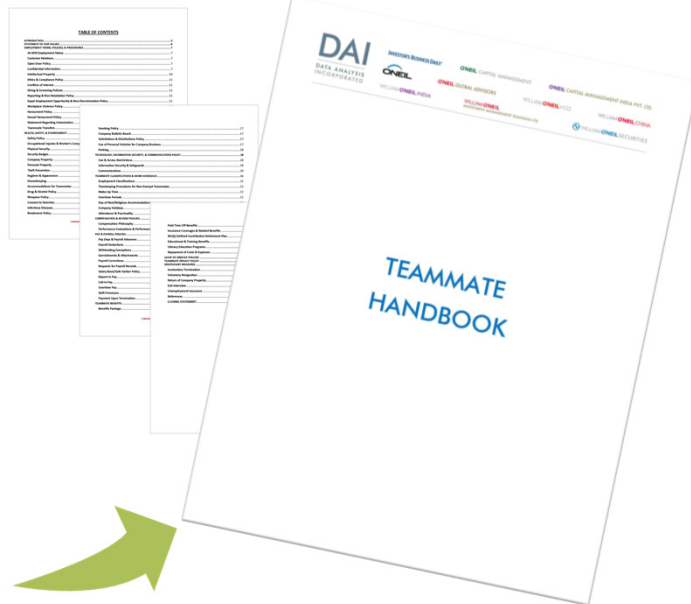
Learning Exchange Guide

34

- Introduce Learning Exchange (read intro text, if desired)
- Read pathway examples
 - [CLICK] Project Management
 - [CLICK] Process Improvement
 - [CLICK] Active Listening
- Mention company-wide & compliance training
- Insert something about the continuous learning environment at DAI and how everyone's pathway is unique to them
- Again, refer attendees back to their handbook for future reference

Teammate Handbook

- Holiday/Sick pay
- Leave of Absence
- Harassment/Retaliation
- 5th-hour meal policy
- Off-site work/social gatherings



35

- Refer attendees to the copy in the Resource Guide or an online location (if virtual attendee)
- [CLICK] to reveal each talking point and offer a brief explanation of each.
 - Holiday/Sick pay
 - Leave of Absence
 - Harassment/Retaliation
 - 5th-hour meal policy
 - Off-site work meetups

Oh no, they didn't! Activity



- Explain to attendees that they will participate in an activity that describes a workplace scenario.
- They will guess what went wrong.
- [CLICK] to go to first scenario

Oh no, they didn't! Activity

Scenario 1:

Joe punches in at 8am sharp. After he punches in, he starts a pot of coffee while looking over the newspaper. He waits for the rest of the team to file in so he can talk about the great football game last night.



- [CLICK] Read the scenario and give attendees a moment to think and respond.
- Give attendees a solution to avoid this pitfall

Oh no, they didn't! Activity

Scenario 2:

Sarah had a rough morning getting to work on time, but she made it! She even forgot her badge. In a scurry, she runs over to Melissa and asks to borrow hers.



- [CLICK] Read the scenario and give attendees a moment to think and respond.
- Give attendees a solution to avoid this pitfall
 - *Refer to security team for a temp badge*

Oh no, they didn't! Activity

Which activity could result in termination?

Cell Phone use in Plant

Bringing your Cat to Work

Not following Standards of Procedures

Not punching out for lunch

39

- Read question and give attendees a moment to process and respond
- [CLICK] to reveal the correct answer

Oh no, they didn't! Activity

If you have been harassed at work, you should give it 48 hours to talk to your family and decide if you should report it.

True**False**

40

- Read question and give attendees a moment to process and respond
- [CLICK] to reveal the correct answer

Oh no, they didn't! Activity

Workplace **harassment** and other **unprofessional behavior** should be immediately reported to the following:

Sue, who sits next to you

The CEO

The People Department

Your Manager

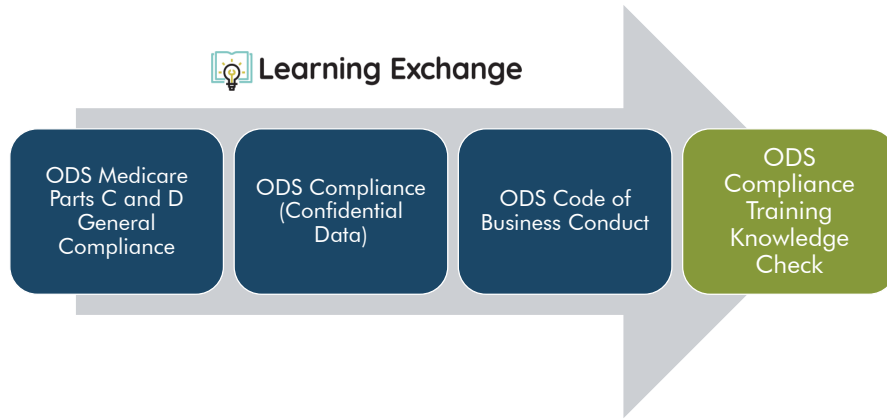
41

- Read question and give attendees a moment to process and respond
- [CLICK] to reveal the correct answer

Compliance Training



Required Compliance trainings for ODS teammates and contractors.



42

- Briefly discuss the mandatory compliance training
- Explain that it must be taken every year
- Refer attendees to the Learning Exchange login info (in the Resource Guide) and other reminders they will receive