

SFS Americas Learning Academy

Refresher on Onboarding & Introduction to Offboarding for
Manager's Training for PS-AM & Functions

Housekeeping Items



The recording will be available on the Learning Academy HUB and the iPortal.



Engage!

Use the icons, unmute your mic, or the chat to ask a question or make a comment.



You will receive digital learning credits for this session. They will be uploaded into the Global Learning Portal (GLP 2.0).

#learnandearn
#sharewhatyoulearn

Meet Our Hosts



Fran Hexberg
SFS PS-AM COS



Katerina Kamaeva
SFS PS-AM COS



Onboarding Refresher/ Offboarding Intro for Managers

Project & Structured Finance Debt Americas (PS AM)

January 22, 2026

Agenda

Time	Topic	Presenter
3:00 – 3:05 pm	Housekeeping & Welcome	Tahisha Adams-Bradford / Fran Hexberg
3:05 – 3:15 pm	People & Organization (P&O)	Suzanne Nietzold
3:05 – 3:15 pm	IT Dept.	Matthew Decillis / Dharmesh Patel
3:15 – 3:25 pm	Refresher - Onboarding Process	Fran Hexberg
3:25 – 3:30 pm	Onboarding Welcome Journey & Applications to Access Data	Fran Hexberg & Katerina Kamaeva
3:30 – 3:40 pm	Introduction - Offboarding Process	Fran Hexberg/ Katerina Kamaeva
3:40 – 3:50 pm	Controls Management	Jason Gross / Jutta Knez
3:50 – 4:00 pm	Q&A	All

People & Organization



Suzanne Nietzold, Global P&O Business Partner
SFS PS-AM

Elevating Onboarding | The Leader's Imperative



A Critical Investment in Our Future



Boost new hire retention by 82 % and Productivity by over 70 %

Strategic imperative directly impacting:



- Team performance
- Engagement
- Long-term commitment

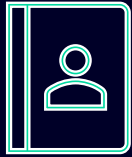


As leaders, you are the linchpin in this process!

...shaping the trajectory of every new team member from their very first day.



The Leader's Playbook



Your 3 Critical Responsibilities

Setting the Stage for Success



- ✓ Workspace Readiness
- ✓ Team Introduction Emails
- ✓ First Day Agenda
- ✓ Designated Buddy

Structured Support & Check-in

30-Day?

60-Day?

90-Day?

- Initial impressions
- Role Understanding
- Team introduction
- Understand team dynamics
- Areas for development
- Review overall performance
- Career aspirations

Cultural Assimilation Activities

... how can you help new hires understand & embrace our company culture?

- **Team Lunches/Coffee**
- **Cultural Norms & Values**
- **Other ideas?**



As leaders, your active involvement is the single most impactful factor in a new hire's success & integration.

WHAT DO EMPLOYEES WANT FROM AN ONBOARDING PROCESS?



72%

1on1 time with direct manager



67%

outline of their performance goals



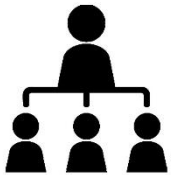
53%

intro to company culture & values



57%

plan for the first few weeks



52%

list of people to meet

46%

exposure to leadership team



45%

job training guides



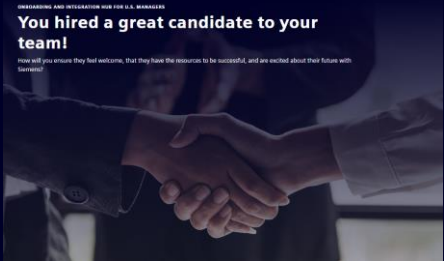
*Statistics taken from LinkedIn Study 'Inside the Mind of the Candidate'

Dear Manager,

Ideas for you to consider:

- Walk your employee through the SOC to give them detail on the **whos' of the whos'**; *Take it a step further: Ask that they identify 1 or 2 people from the SFS PS-AM group to randomly reach out to and learn more about the business (Empower them day 1!)*
- **Networks** - Refer them to follow VivaEngage
- **Storytell** – Talk to them about **the culture** at SFS and leadership (Learning Academy, Holiday party, Bagel breakfasts and alike, when is a good time to meet in the office etc)
- Mutually **align on expectations** on a continual basis by using Growth Talks and note them using Workday
- **Weekly check in** – 'How are you doing? What can I do to enable you to bring your **full self to work?**'

Overview of the SFS Learning Channel & U.S. Onboarding Materials



Onboarding and Integration Hub for U.S. Managers

Pre-boarding & Onboarding

- Keep new hire informed and prepared for their first day
- Follow steps to ensure IT accounts are active on the first day
- Create a welcoming atmosphere, whether working on-site or remote
- Set the new hire up for success
- Assign a Buddy
- Be accessible

» Begin

Training, Development & Growth

- Establish a training plan for success in their new role
- Unlock their potential with development tools and resources
- Enable career growth through upskilling, development programs, and career pathing so the new hire can have a successful career with Siemens

» Build

Integration, Engagement & Well-Being

- Foster a sense of belonging
- Drive engagement through your leadership style
- Reward and recognize performance
- Focus on well-being

» Connect

Updated: Oct 30, 2025

New @ Siemens Financial Services (SFS)

Welcome to Siemens Financial Services (SFS). We are happy to have you on board! 😊

Followers: 72

★ 4.2 (6)

Your Rating: ★ ★ ★ ★ ★

Overview

You want to get up to speed quickly? Then you're in the right place! This knowledge board contains all basic information about SFS and our Portfolio. Moreover, we cover you with basic information about Siemens and the other business units as well as useful links you should definitely bookmark. 😊 Our recommendation: Click on the follow button in the upper right corner to get notified about updates of our board.

Details

Find more information and content about Siemens Financial Services on our [SFS Intranet](#)

SFS Learning Channel | My Learning World

- Sustainability
 - Leading in Business Ecosystems
 - Your Growth @ Siemens & Deep Dive
 - Getting started made easy
- Overview of the Siemens Businesses
 - Financing for: Siemens DI & Siemens SI
 - Siemens Xcelerator
 - #IncludeEngageEmpower at SFS

IT Dept.

Presented by Matt Decillis, SFS US IT Partner
Dharmesh Patel, SFS US IT TechBar

• IT & Facilities Onboarding Process – Completing an NRRF Form

Managers must notify IT at least 10-14 days before a new hire's start date
This process covers onboarding of new hires, transfers, FLDP's interns, consultants, etc.

1. Email Matt Decillis and Dharmesh Patel with new hire info:
 - Name, start date, personal telephone #, Photo for PKI card
2. IT will send the New Resource Request Form (NRRF)
 - Please complete NRRF form entirely, verify the information is correct, and then digitally sign the form at the bottom and save it.
3. Follow up one week prior to the hire date to confirm IT equipment will be ready, listed below:
Laptop, Headset, PKI card, Cell phone

*****Please note that the form will not allow any changes **ONCE** signed, so please verify all choices before digitally signing it*****

Other Important SFS IT Information

- 
- **SFS IT will begin working on the request in the background** prior to the new hire's start date to prepare building access, hardware, and the PKI card.
 - **SFS IT will coordinate with the hiring manager** to confirm whether the new hire will be onsite in an SFS office on their first day or working remotely.
 - **Please notify SFS IT as soon as possible** regarding any changes to the start date, access requirements, or other onboarding details. Early notification helps ensure the new hire's first day is smooth and efficient.

Reminder:

Providing SFS IT with **10–14 days advance notice** prior to the employee's start date is **essential** to ensure all provisioning steps can be completed on time.

Refresher to Onboarding Process



*Francine Hexberg, Onboarding/Offboarding
Coordinator*

Manager Onboarding Process

Your Roadmap for Successful Onboarding



Manager Checklist

Pre-onboarding to first 30 days



P&O - Talent Acquisitions

T&A will email you once background check and drug screening are completed.



IT Dept./Matt & Dharmesh

Complete and submit New Employee Requisition Form (NERF)



Notify Onboarding Coordinator/Fran Hexberg

Communicate new employee info, including resume and picture



Identify a Buddy

Find a buddy volunteer



Completion Form

Confirm Manager Checklist items were completed after 30 days

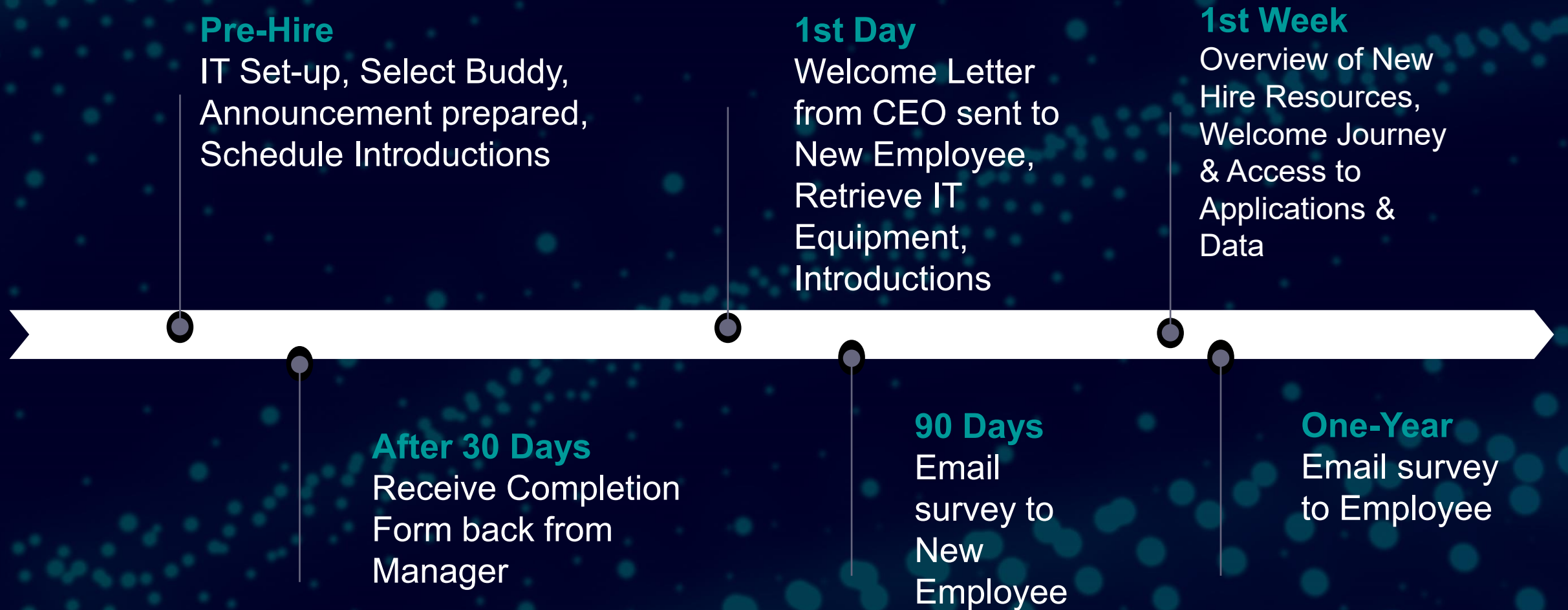


Manager Resources Hub - Overview



- ✓ Step 1: Manager Checklist / Action Items
- ✓ Step 2: P&O - Talent Acquisition (TA)
- | ✓ Step 3: Notify SFS IT Dept.
- ✓ Step 4: Notify Onboarding Coordinator
- ✓ Step 5: Identify Buddy
- ^ Step 6: Manager Checklist Completion Form

PS-AM Onboarding Process - Timeline



Onboarding Welcome Journey & Applications to Access Data

Katerina Kamaeva, Business Development – Data & AI
Francine Hexberg, Onboarding/Offboarding Coordinator

Software applications, platforms and sites access request process named # 1 challenge new hires face*



** PS AM New Employee Survey:
What was the biggest challenge you faced getting acclimated into your new role?
Do you have any suggestions that we can improve on?*

The Typical Risk Manager or Analyst uses...

If this is your role...		Lease Operations	Sales and Risk*	PS AM Business Headquarter	Finance & Business Controlling	US Accounting	Loan Operations	Risk Analytics & Asset Liability Management
... these are the recommended systems	SCM							
	HFM							
	Esprit							
	S4P							
	E1P							
	Mirror							
	SuperTrump							
	AWARD							
	PPR							
	SieSales							
	Willi DB							
	Cassiopeae							
	LoanIQ							
		Recommended systems						

*separate roles for Sales and Risk CLE, PF and SF

9+ software applications

2+ team sites

2+ data sites

6+ roles on DaVinci platform

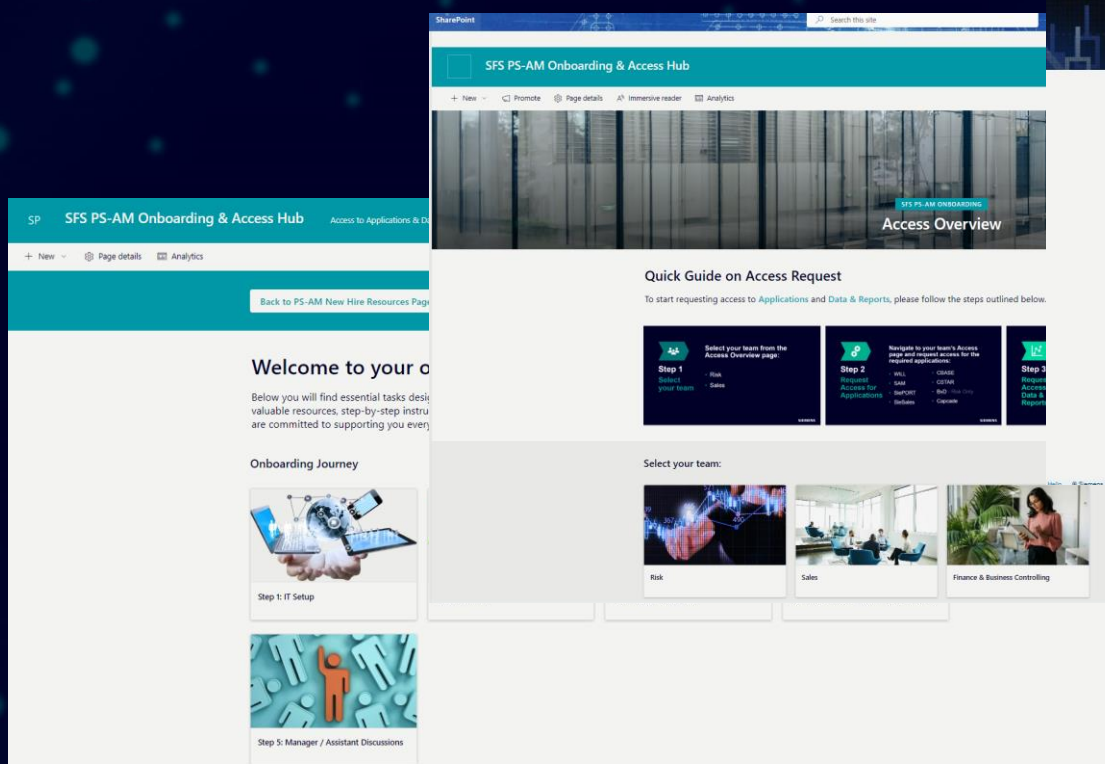


We need to streamline our applications and data access processes so that new hires can feel **prepared for their role** and be **engaged with their teams quickly**.



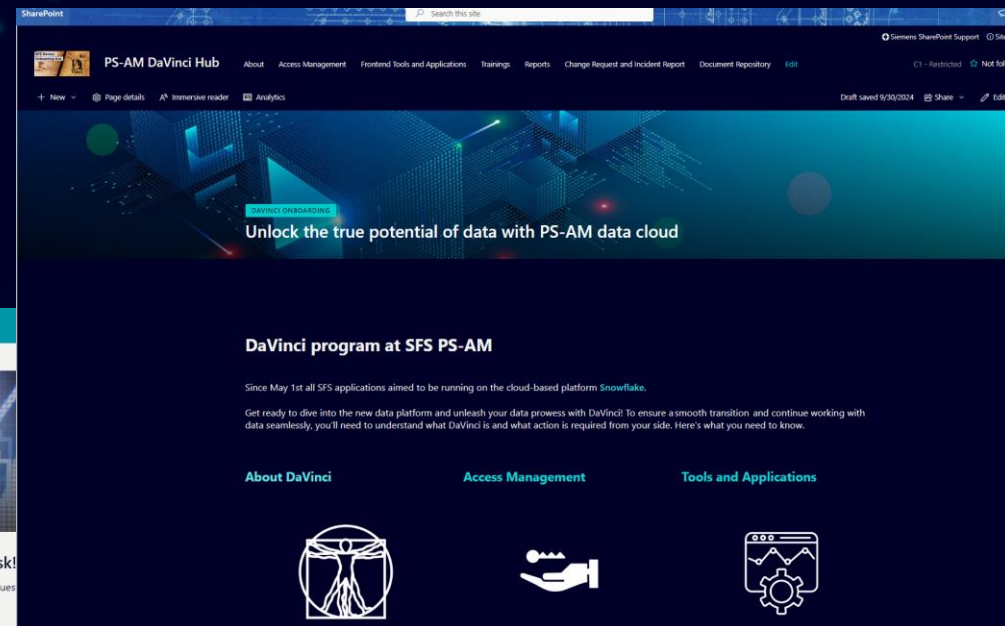
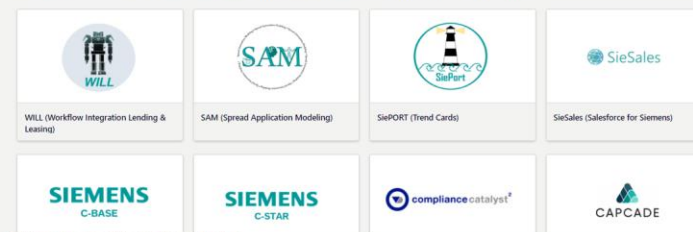
SFS PS-AM Onboarding & Access Hub - Demo

One place for all onboarding, applications and data access request processes



Access to Applications

For each application, please follow the steps required to request access and complete the trainings:



SFS PS-AM DaVinci Hub

One place for all PS-AM relevant information on DaVinci data platform

Introduction to Offboarding Process

Francine Hexberg, Onboarding/Offboarding Coordinator
Katerina Kamaeva, Digitalization & Data Analytics

Project Goal: Optimize Employee Offboarding Process At PS AM



[Click here](#)



[Click here](#)

Create the centralized hub for offboarding processes, integrated into the Employee Resources site.

Create clear step-by-step guidelines for managers in access revocation and digital asset ownership transfer.

Automate application and data access owners' notification process, create awareness.

Offboarding and SFS IT

- **Notify SFS IT (via encrypted email) as soon as possible** once an offboarding has been confirmed. SFS IT understands that timing may vary due to multiple factors involved in the process.
- **SFS IT will coordinate the collection of all company assets**, including hardware, the PKI card, and any other issued equipment, directly with the departing employee and/or P&O/Manager.
- **Important:** Please inform SFS IT of **any special requirements**, such as data collection, data preservation, or other access-related needs, so that all necessary steps can be completed before the offboarding date.

Manager's Offboarding Responsibilities & Workflow



Streamlined P&O and IT equipment offboarding site content: [New Hire Resource Sharepoint](#)

New site page with guidelines of access removals and automated process of notification: [Offboarding Page](#)

Submission of “[Request to Revoke Additional Application and Data Access](#)” form completed by the employee’s manager.

This step will trigger an [automated workflow](#) that will send an email to application and data access owners to revoke access.

Controls Management

Jason Gross, Head of SFS CMT AM (Controls Mgmt)

Jutta Knez, Senior Controls Analyst

ACL Leaver Management Process – Information Security and Regulatory Requirements

- **Need-to-Know & Least Privilege:** Access rights must be granted strictly on a "need-to-know" basis, meaning users only get access essential for their specific tasks. The "least privilege" principle dictates that users should have the minimum necessary access to perform their job functions. (SFeRa ST010-0141, SFeRa ST010-0142, MaRisk AT, BAIT Para 24, MAS 9.1.1, MAS 9.1.7)
- **Segregation of Duties:** Incompatible activities must be performed by different staff members to prevent conflicts of interest and reduce the risk of fraud or error. This is crucial even when staff change roles. (MaRisk AT, MaRisk BTO 9, BAIT Para 24, MAS 9.1.1)
- **Prompt Adjustment/Revocation of Access:** Access rights must be swiftly adjusted or revoked when responsibilities change, or an employee leaves or moves within the company. This is a paramount requirement to prevent unauthorized access. (SFeRa SISP-09.2.6-01, MaRisk AT, BAIT Para 26, MAS 9.1.7)

ACL Leaver Management Process – Primary Goal

The primary goal of the Leaver Management Process is to ensure the correct and secure handling of access rights for employees who are either:

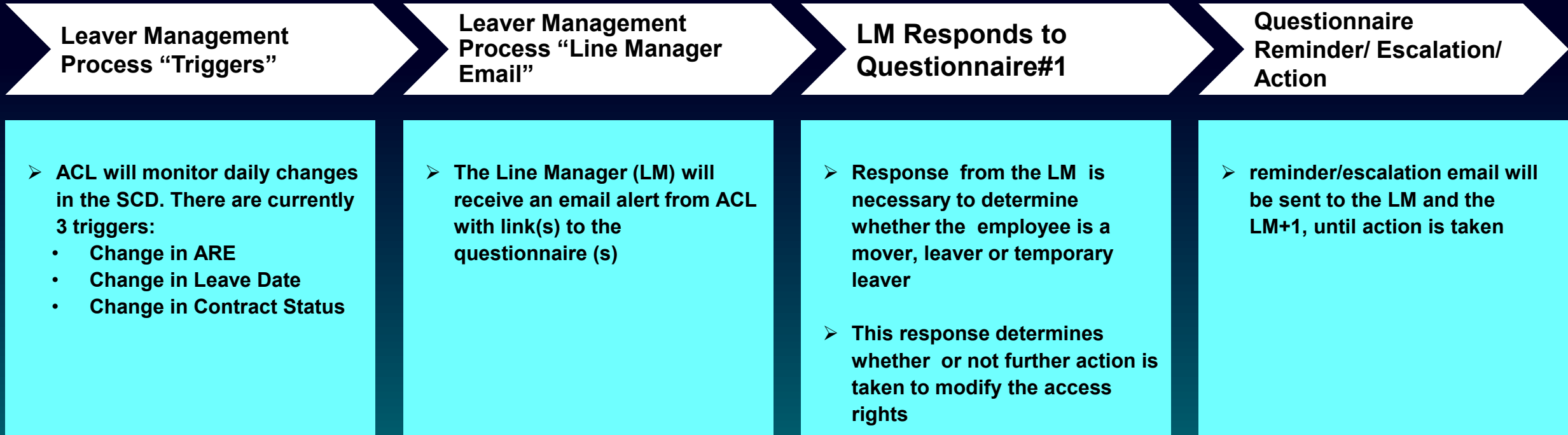
Changing roles or departments within the company (Mover process): This requires updating or adjusting access rights according to the employee's new responsibilities.



Leaving the company (Leaver process): This involves the timely and complete termination of access rights to IT applications and systems.

Temporary Leave (e.g. sabbatical, maternity leave, long term absence):
This necessitates the temporarily termination of access rights to IT applications and systems.

ACL Leaver Management Process - Questionnaire and Action to be Taken



ACL Leaver Management Process - E-Mail notification to the Line Manager

Respond to Leaver Management Process (LMP) - ACL Questionnaire#1 ACTION REQUIRED

notifications@diligentoneplatform.com
To Knez, Jutta (SFS CMT AM)

This sender notifications@diligentoneplatform.com is from outside your organization.
If there are problems with how this message is displayed, click here to view it in a web browser.
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Reply Reply All Forward

Respond to Leaver Management Process (LMP) - ACL Questionnaire#1 ACTION REQUIRED

In order to ensure compliance with the Information Security requirements regarding the Leaver Management Process (LMP), it is requested that you complete the following questionnaire in ACL regarding your role as a Manager (or Manager + 1) of an employee in the SCD that appears to have a triggering condition possibly requiring removal or change of access permissions to certain applications. Multiple employees or employees with multiple roles will be listed separately in the record list below of this email.

FOR FIRST TIME USERS ONLY : For those using the system for the first time, you will need to register your activation with this URL below and then proceed back to this email for the respective Questionnaire links:

<https://siemens-financial-services-gmbh.results-eu.diligentoneplatform.com>

You will be prompted to login with Siemens MyID via PKI to submit this Questionnaire.

Questionnaire	Record ID	APPLICATION NAME	FIRST NAME	LAST NAME	ROLE	PERMISSIONS	EARLY LEAVE DATE WARNING	TRIGGER 1 ARE CHANGE	TRIGGER 2 LEAVE DATE WARNING	TRIGGER 3 CONT STATUS CHANGE
 RESPOND	39104	Credit_Database			ARE User with ordering possibility	7411	NO	YES	YES - BLANK LEAVE DATE	NO
 RESPOND	39110	BWP			VARIOUS	VARIOUS	NO	YES	YES - BLANK LEAVE DATE	NO

ACL Leaver Management Process – Pressing Respond pop up of questionnaire #1

Leaver Management Process (LMP) - ACTION REQUIRED by Manager / Manager + 1
(ACL Questionnaire#1)
Siemens Financial Services

Instructions

You are receiving this Questionnaire in ACL since you are the Manager (or the Manager + 1) in SCD for employees that have a leave date or status change occurred where possible action is required with respect to the employee's application access. Please...

[Show more](#)

Related files

 LMP_Manager_Instructions_v1.3.pptx

New

Details

CROSS REF3
GROUP_RA_DEFAULT_5026_LMP_QUE

EXCEPTIONID
20705046

MANAGER Highbond Ready
YES

MANAGER PLUS 1 Highbond Ready
YES

Analytic Number
LM-2120

QUESTION 1: Please select how the employee's access rights will be handled for the respective application and role. (required)

Instructions

Answering the questionnaire does not substitute your action to request the termination or change of access rights according to the respective application user management process. Based upon selection below, certain follow-up questions will be prompted.

☐ A) Access rights to the respective application will be terminated immediately following the leave date.

☐ B) Access rights to the respective application will be fully terminated after the 'know-how' transfer period has been finalized. ONLY populate the date in Question 2 for the termination date upon knowledge transfer.

☐ C) Access rights to the respective application will be partially adapted after the 'know-how' transfer period has been finalized. ONLY populate the date in Question 3 for the termination date upon knowledge transfer.

☐ D) Employee shall retain access rights. Comments are required below in Question 4.

Provide any additional notes or comments as necessary (optional).

Instructions

Please do not provide any personal or sensitive information within.

Submit

Save

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Questions?