

CONSULTANT

HANDBOOK



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Introduction Letter

Alcanza Consultants, September 9th, 2022 Culiacán, Sinaloa.

Welcome!

It is my distinct pleasure to welcome you to the Alcanza Team, where we believe that you will make a lasting impact on clients, community and each other. At Alcanza, we are committed to creating an accepting, innovation-driven teaching culture where we prioritize the needs of our clients and develop as teaching professionals.

I am proud to state that since our start date on June 1st, 2018 in a Starbucks coffee shop, we have created an international team of consultants serving hundreds of clients, founded several nonprofit programs, and built bridges throughout our community. Yet, we continue to give every client a unique treatment, concentrating on their goals and needs. Our focus

on innovation, adaptation and teamwork are the pillars of our constant growth and success.

This handbook contains the introductory information about Alcanza Consultants including procedures, policies, structure and contact methods. Since transparency and honesty are core values in our organization, we are always available to explain or provide additional details. Alcanza's procedures and structures are aligned to provide the maximum benefit to our clients and consultants.

As an Alcanza Team member, you are a valued part of this organization and community - welcome to making a change!

Best Regards,

Ryan Storr

Founder, consultant and Director of Alcanza Consultants

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INTRODUCTION

Welcome to Alcanza! This handbook contains all the information you need to know to get started within the organization: company policies and structure, legal information, processes, materials used, communication platforms and guidelines, etc. By signing this handbook, you accept to follow company procedures and respect company policies. Throughout the handbook, you will find appendixes with additional information should you need more details. At the beginning of the handbook, you will find a list of contacts. You should get in touch with your team leader regarding further questions about the handbook. Should you disagree with a specific point mentioned in this handbook, we invite you to get in touch with the legal

department to settle any doubt or issue.

IMPORTANT CONTACTS

We encourage all team members to engage in open and honest communication with the management team. Initially, we recommend that team members contact their direct manager or team leader, and we have listed the initial contacts and their area. However, for critical or sensitive issues, managers from different areas or Ryan Storr (owner and founder) can be contacted directly.

Who to reach for the following purposes:

- **Academics:** Academics Director - Maja Pejuskovic: maja.pejusko@alcanzaconsultants.com
- **Teaching:** Academic Leaders :Edgar Cuevas - edgarcuevas.alcanza@gmail.com ;
Bernardo de León - bernardodeleon.alcanza@gmail.com

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- **Class Logistics:** Operations Manager - Maria Luisa: Marialpalazuelos@gmail.com
- **Payroll:** Human Resources - Maria Luisa: rrhh.alcanzaconsultants@gmail.com
- **Client incident:** Your direct manager and Operations Manager
- **Volunteer Program:** CEO - Ryan Storr: ryan@alcanzaconsultants.com
- **Time off/absence requests/admin issues:** Human Resources - Maria Luisa: rrhh.alcanzaconsultants@gmail.com

OVERVIEW: WHO WE ARE

MISSION

We build bridges between communities and individuals through language acquisition and usage, applying innovative and nontraditional solutions to help our clients achieve their personal and professional goals.

VISION

Languages are a fundamental tool to connect communities, educate individuals and promote empathy across borders without socio-economic differences. We believe that increasing connection and promoting shared experiences generates empathy, innovation and improvement throughout the community

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VALUES

- **Teamwork:** this is our core value and the base of the company. We work together to accomplish the company's mission and are united by a sense of belonging. We support each other and celebrate group successes.
- **Integrity:** we commit to deliver the best possible service to our clients. We assume

responsibility for our actions, behavior and words. We respect each other's abilities and qualities, and our clients.

- **Constant growth:** we aim for constant improvement at all levels of the company. We welcome ideas and feedback from clients and consultants, encourage training among team members and promote personal growth.
- **Passion:** we love what we do and are constantly striving for excellence in what we do. We encourage taking initiatives to propitiate creation and success.
- **Communication:** we listen to each other and to opposing opinions, value feedback and work together to solve conflicts through respectful communication and empathy in the workspace. Open and honest communication is vital to creating strong relationships.

At Alcanza, we are committed to diversity, equality and respect of all our stakeholders. We respect the sexual, religious and political preferences of our clients and team members.

We value every member of the team and their well-being. We take care of each other and work to create a healthy environment. Any type of harassment, or behavior that attempts against a team member's beliefs or integrity will not be tolerated.

WHAT WE DO: Services

Language classes English, Spanish, and French

Our translation work is characterized by having native and expert

Professional translations

Training

Writing professional texts

Language level assessments

College applications

Exam Preparation: (TOEFL, IELTS, GRE, SAT, ACT)

Consultants. This service encompasses a variety of written works such as academic articles, newspapers, books, business presentations, university essays, etc. These give the tools and replicate the current contexts.

Workshops and Masterclasses Specific topics, such as resume writing, academic writing, customer service, language acquisition etc.

We prepare our clients to meet their professional challenges: interviews, conferences, presentations, meetings, and much more. We can help with any context that arises.

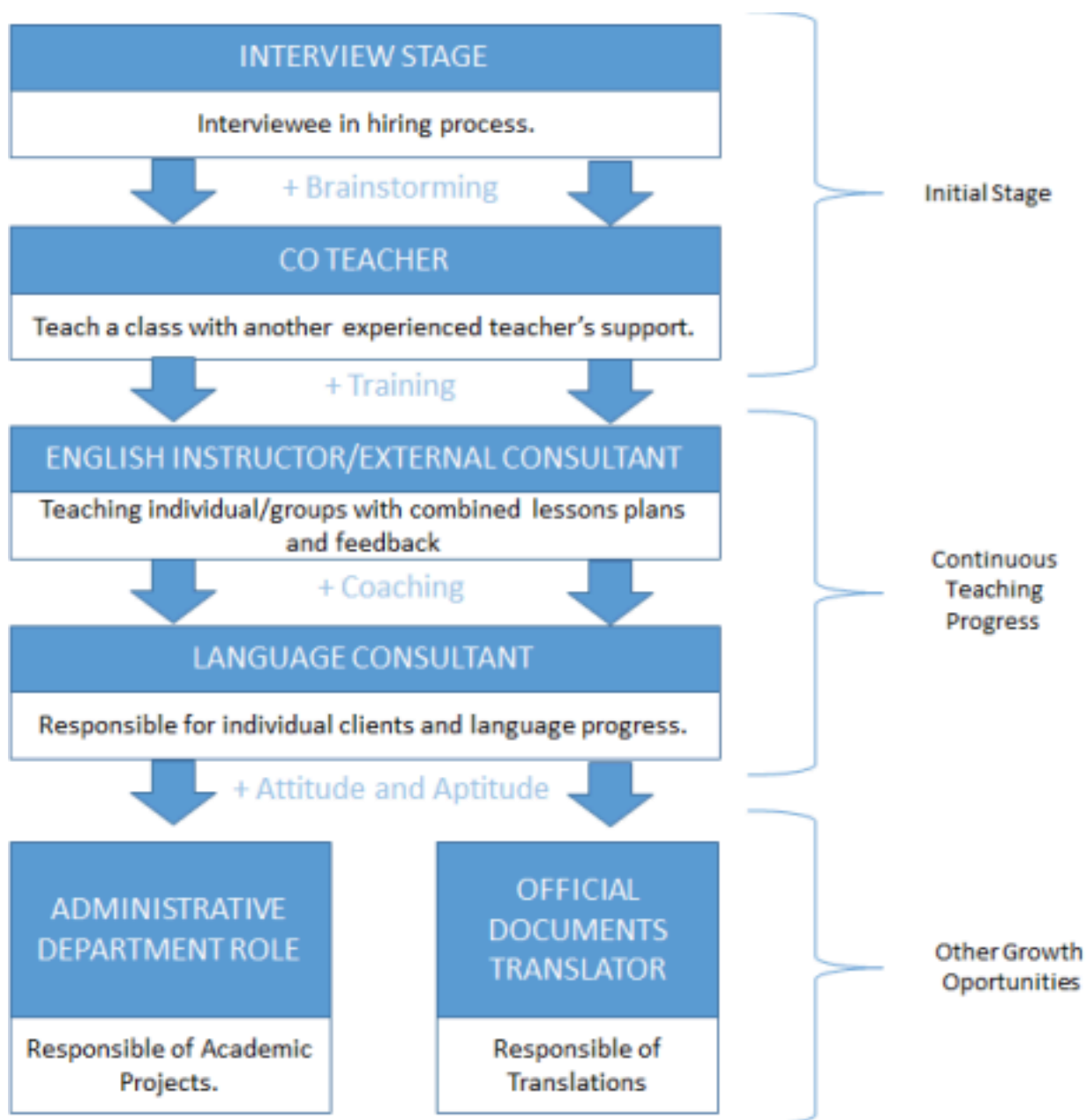
Our professional team in the USA assists clients in the creation and publication of texts, guaranteeing quality and authenticity in written works in terms of vocabulary, structure, theme, organization, coherence and the effect of argumentation.

The current level of the client can be determined according to their speaking, writing, reading and listening skills accurately. Our team of experts, including a remote team in the city of Boston, evaluate language skills through a tested methodology, in line with the Common European Framework of Reference for Languages. This depends on the client profile and needs.

We guide our clients in the preparation process and provide the necessary materials to successfully apply to a university abroad. We provide support in understanding the program and necessary requirements. We adapt the exercises and preparation program to the client level to achieve the desired percentage.

CONSULTANTS' RIGHTS AND RESPONSIBILITIES

PROMOTION AND GROWTH



People who represent Alcanza's values are encouraged to pursue professional growth within the company, therefore, we encourage our team members to reach out to management when interested. As an organization, we are constantly informing our team

members about the work opportunities that are available, this with the objective of

considering the vacancy in case it is offered.

There are several positions that a teaching team member can apply to if available.

Team members may be offered an application priority based on the following criteria:

- Passion
- Skills
- Dedication
- Performance
- Fulfilling and representing our values

RESPONSIBILITIES

Alcanza Consultants' Best Practices for teaching

1. Putting the clients best needs first and acting consistently in their interest, respecting clients' demands and learning process.
2. Being punctual and respecting other people's time - regarding lessons and internal meetings
3. Being respectful and professional at all times with clients and team members, respecting limits between personal and professional relationships.
4. Respecting Alcanza's dress code policy as well as other teaching policies (in appendix)
5. High work ethics, commitment to Alcanza's values and fulfillment of assigned responsibilities (regarding teaching, weekly and biweekly meeting and administrative work)
6. Communicating updates, concerns and logistic aspects to maintain an effective flow of information.

ALCANZA'S COMMITMENT WITH OUR TEAM

1. To ensure a healthy and safe work environment.
2. To send compensation accurately and punctually.
3. To provide necessary training and support.
4. To keep personal information confidential.
5. To give a copy of the consultants Onboarding Handbook, Contract and payroll receipts.
6. To give accurate and factual information about the classes for which you are teaching.
7. To recognize consultants' contribution.
8. To give regular feedback

LEGAL/OPERATIONS

LEGAL INFORMATION

OFFER LETTER

After the interview and coteaching stages of the hiring process, the individual will be given an offer letter to work at Alcanza Consultants. The letter will contain the compensation, position, responsibilities and benefits of the position; it will be sent before a contract is signed for the individual and establishes legal working conditions. Offer letters will be sent via email every 6 months or as conditions allow.

CONTRACT

Alcanza offers two distinct types of contracts for consultants in order to benefit both parties. We offer our teaching team the flexibility to have more than one job but request open and clear on time availability so expectations are set:

Full-time Contract

Full time instructors or team members may be offered a full time position with all benefits accorded by Mexican law possibly including IMSS and will be offered for a predetermined amount of time. Upon completion of the contract, it may be renewed or the employee will be released in accordance with Mexican law.

Part-time Contract

Instructors and consultants that are engaged in part-time services will receive a flexible contract for a predetermined amount of time. The contract establishes compensation, hours, requirements and other conditions. After its expiration it may be renewed by Alcanza consultants and all obligations will be finished at that time in accordance with Mexican law.

Flex-work

All team members or consultants have optional flex work that is compensated per hour by working on side projects for the Academics or Administration Departments. If a consultant wants to do flex-work please reach out to a manager or Ryan Storr to be assigned to specific tasks and/or projects. When finished, it is necessary to submit an email to the corresponding manager with a list of activities and times so it can be

approved. After it's approved, all flex-work hours will be added to the consultant's payroll in the closest Payday.

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COMPENSATION

- All team members must provide full Name, RFC, CURP, current address, and sign a contract in order to receive their compensation.
- The information provided to Alcanza will be confidential and saved in our consultant's data-base. Payroll will be the 15th and the last day of the month.
- Payroll can be through a bank transfer, paypal or cash payment, according to the team member's preference and company needs.

- Payroll receipts & pre-receipts will be available at the website in the HR Section. •

Referral Fee: Alcanza encourages team members to refer as many potential clients as they want to. As a thank you, Alcanza will provide the equivalent of two taught classes, which will be compensated in the following quincena after the referred client pays for their first month of classes.

- Bonuses can occur at various moments. Christmas bonuses (Aguinaldo) are included, as well as Finiquito, both according to the team member's position.

- Necessary material may be purchased for staff such as markers or paper. •

Classes canceled in a 2-hour period or less are fully compensated. Only classes canceled under emergency circumstances cannot be charged.

- Federal holidays are respected according to Mexican Law.
- Vacation days will be offered during Semana Santa and Christmas (these may be paid or unpaid).
- Sick days (paid or unpaid). For more information see **Sick days and time off Policy**.

POSSIBLE BENEFITS

- **Wellness package:** it may include the possibility for gym membership, materials, therapy session, business attire or other professional/emotional support. Other benefits proposed by the team member can be considered for this benefit. The specifications are:

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- Monthly benefit for full time employees
- One benefit per month, it can vary from month to month.
- Bonuses can be received as wellness package options.
- Part time consultants can get a one time Benefit during the month of their anniversary with Alcanza.
- **Jardin Botanico Library yearly membership:**
 - This benefit is given to Full time members who have been working in Alcanza for more than a year upon request.
- **Scholarship** for training courses, such as TEFL (Teaching English as a Foreign Language)
- **Second or third Language Class discount**
 - A 25% discount will be offered to team members who want to take second/ third language classes that Alcanza offers. Interested team members will send an email requesting the classes and will be part of the same process as an Alcanza client.
 - Interested team members need to send an email requesting their benefit and they will start the new client process having the opportunity to get a consultation and a free trial class as all potential clients do.

POLICIES

ETHICS CODE

1. When an incident happens that is out of the ordinary, uncomfortable or unprofessional, I communicate it and report it in the client incident form.
2. We must share information to our clients about their progress and propose solutions. We guide them through the feasibility of their goals and how to reach them.
3. We are aware that the clients in Alcanza are indeed company clients, so I can not encourage a client to receive private classes or additional support with me outside of the organization.
4. We do not accept teaching a client at their or my home, or other space that is not their office and/ or a neutral space. Every class is on the calendar and managed by operations.
5. If a client asks to stay extra or free time off charge, we politely decline and offer to cover that material in the next class.
6. Pictures with clients on social media are acceptable as long as we are representing ourselves and the company in a positive way. Both parties must be aware of this and give their consent before posting them.
7. We maintain confidentiality of any personal/business information shared by the client during class. We should not mention or divulge information, such as language level, attitude or progress, about another client.
8. If we use material written or made by a client, we will ask for permission and cite their work appropriately.

Legal disclaimer: Consultants cannot hire personnel to collaborate directly or indirectly with clients, nor may they use client information for personal purposes. In case of violation of this clause, Alcanza Consultants will proceed with legal actions.

CLIENT INCIDENT FORM

The Ethics code of Alcanza Consultants reflects our values as a Company and as individuals in possible contexts, and we work to maintain those at all times. Therefore, we created an incident form for consultants to express issues with clients that occur during class or out of work contexts.

This tool will help us keep a record of future incidents and situations with our clients, allowing Managers of Alcanza departments to evaluate the situations and to decide what actions need to be taken in benefit of both parties. This may range from requesting

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behavior or interaction changes from a client to a refusal to offer services depending on the situation. Consultants will not teach clients who are rude, disrespectful or make inappropriate comments towards them.

Anonymity in the form is up to the team member and the required information boxes are indicated. In case you want to follow up the complaint, please also email the operations account operations@alcanzaconsultants.com .

Client Incident Form <https://forms.gle/deUhKo9Mr9ZxsmMPA>

CONFLICT RESOLUTION

We encourage all team members to engage in open and honest communication with the management team. Initially, we recommend that team members contact their direct manager or team leader, and we have listed the initial contacts and their area. However, for critical or sensitive issues managers from different areas or Ryan Storr (owner and founder) can be contacted directly.

Who to reach for the following purposes:

- **Academics:** Academic Director - Maja Pejuskovic
- **Coaching:** Academic Leaders- Edgar Cuevas and Bernardo de Leon
- **Class Logistics:** Operations Manager - Maria Luisa
- **Payroll:** Finance Department - Ryan Storr and HR
- **Client incident:** Your direct manager and Operations Manager
- **Volunteer Program:** Ryan Storr and Rocio

As an Organization, we encourage our team members to share and voice their concerns in the quest of improvement, progress and a better work environment; therefore, these are the points to consider for solving a problem between your peers.

- When having a problem with a person from your team please voice your concern to

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your direct manager.

- When having a concern with your direct manager you can reach out to any other manager in the team.
- There are two ways to present and follow up your concern
 - Formally: there is a meeting and record of the events.
 - Informally: No record of the events.

- All points of view will be considered and reviewed, however, aggressive, intense and/ or manipulative behavior towards any team member will not be tolerated.

DISCIPLINE POLICY

1. **Verbal warning:**

This should be for minor issues, reinforcing expectations and finding solutions. It depends on the willingness of the individual and management to achieve an amicable solution. Any manager can give a verbal warning.

- a. Signed, only spoken or via media.
- b. The option for the delivery system and record keeping depends on management.

2. **Written disciplinary referral:**

This is intended for serious issues and infractions that affect the team, clients, organization or community. This indicates that a team member needs to realign his or her expectations, actions, behaviors or attitudes. It also indicates that a verbal warning is not sufficient or was not effective. Three referrals will equal a termination, and each disciplinary referral must be administered by the CEO.

- a. Emailed and signed.
- b. Part of the company record.

3. **Suspension:**

This is an immediate cessation of activities and classes for the team member. Reasons may include threats, danger, risks to reputation, aggressive behavior, violence, illegal substance usage, extreme unprofessionalism, refusal to follow corrective actions after disciplinary referral, repeated negative behaviors or refusal to correct them, etc. a. With payment (usually given when more information is required after a complaint or situation has occurred).

b. Without payment.

4. Expulsion:

Unable to resolve continued issues, danger to clients or team members, a refusal to follow Alcanza norms or in violation of the contract or code of ethics.

a. Termination with a signed document

DRESS CODE POLICY

Alcanza's dress code policy is designed to provide a consistent professional appearance to our clients. Team members are expected to dress in business casual or business formal attire, and must always present a clean, professional appearance.

- For online classes, team members should be wearing a collared top (blouse/shirt/polo), without stamps or offensive messages.
- Clothing should be well fit
- Clothing and grooming styles dictated by religions are exempt from dress code policy.

Body modifications:

We support individuality and encourage self expression; this is why we have no restriction regarding tattoos, piercings, or hairstyles. We do require that the team member notifies Alcanza of the modification at least a day ahead of this change.

For more information about the dress code please check the next

document:  [Alcanza Dress Code](#)

GENERAL POLICIES FOR REQUESTING TIME

SICK DAYS

A team member who feels sick or generally unwell can request a sick day from his immediate supervisor. This should be reserved for physical conditions that prevent a team member from performing their responsibilities adequately or that impact the health of a team member. Sick days should be taken to recover physically, and requests should include a reason for leave. After more than one day of sick leave, a doctor or medical note or letter will be necessary to substantiate the time off. Individuals found to abuse their sick leave, take additional time without a medical certificate or faking conditions will receive a disciplinary referral and possible termination.

The immediate manager of a team member should be contacted as soon as possible about the possibility and eventual time off request. This will ensure that the manager can make arrangements for the team and clients. The request should be emailed to the manager at least two hours before work start time or class, and a follow up message should be sent through WhatsApp or slack to notify the manager. Failure to do this will

result in a disciplinary referral.

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Compensation will not be offered for individuals on a class by class compensation basis. Salary employees will receive 5 paid sick days per year with a possible 5 more to be offered for exceptional teamwork or in the case of serious injury-illness.

MENTAL HEALTH DAYS

Team members are encouraged to maintain their mental health, which includes stress, depression, exhaustion etc. For this reason, individuals on full-time salary receive a health and wellness package— monthly therapy, gym membership, spa treatment or another benefit. Moreover, all team members are encouraged to take mental health days during which he or she could recover. These days should be requested openly and appropriate times-days in the schedule should be made available. These days should be scheduled in advance via email and WhatsApp-Slack.

In terms of compensation, these days will work the same as sick leave. Aside from sick days if more than 2 per month are used by Staff, you should meet with managers and discuss further support. Consultants may take a mental health day in extraordinary circumstances. Their classes will be reassigned to a team member.

VACATION DAYS

Everyone needs to have time away from work and the time to explore other opportunities for some time. Vacation days are offered at Alcanza, but the quantity and compensation vary depending on the contract of the individual. However, vacation time must be requested at least 7 day's notice via email and message to the immediate manager, and the manager and general director must approve of vacation time. Vacation days must not disrupt general operations or client progress in Alcanza.

Salary employees received an average of 6 vacation days per year with additional days available for exceptional teamwork, professionalism, responsibility and performance. Additional unpaid days may be requested, but approval remains with the manager.

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HOLIDAYS

Team members will not be required to work on holidays; otherwise, they will be offered additional compensation as the law dictates. Part-time individuals may be offered to work for additional compensation though agreed upon by both parties.

OPERATIONS

ALCANZA LINE

Alcanza maintains a permanent Whatsapp line open to solve any logistical, client or team issues, and shared among several administrators. It is active from 8am to 8pm (Culiacan Time) Monday--Friday, and 8am to 2pm on Saturday. Team members can contact the line during these times to solve logistical issues, answer questions or confirm information. Consultants can also leave a message for further required actions.

When contacted by the line outside of these hours, it will be with the purpose of informing you about a schedule modification and/or cancellation, therefore, no reply is necessary.

If in an emergency the line is nonresponsive or action is needed immediately, Ryan Storr,

as Founder and CEO is always available, as well as the consultants' Manager for teaching concerns.

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AVAILABILITY

Availability updates and modifications should be shared directly with our Operations Coordinator through the Alcanza Line. For hourly-based team members, availability remains open for modifications, while for full-time collaborators, schedule depends on the agreement that Consultants and Alcanza agree on.

Open communication at all times by both parties facilitates assigning classes based on the clients needs, and pairing them with the best consultant at the time a class is requested. Consultants should inform about their availability updates, otherwise operations will continue to consider the previously shared one.

CLASS SCHEDULING

Lesson planning for Monday classes happens on Sunday evening. The rest of the classes are confirmed during the week. The Alcanza line notifies consultants when the schedule is updated on the Slack #classes channel. Team members must check their calendar frequently during the week, since changes (new classes, cancellations or rescheduled classes) may happen; if so, the Consultant will be notified directly by the line. When the line asks for availability for a class on Whatsapp, **please confirm or decline within 1h** so that the line can take appropriate action. The line appreciates the consultants' commitment to check their calendars frequently, since occasionally classes might be scheduled without prior notification.

The Alcanza line will not assign classes outside of the shared teaching availability but will offer the opportunity to teach extra classes.

CLIENTS AND LOCATIONS

Each event in google calendar has the client's name and location of the class. For remote classes, the client's phone number is added for contacting purposes exclusively, and Consultants must send the link of their Google meet/Zoom/Microsoft Teams meeting via Slack to the Alcanza Consultants line before each class.

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ACADEMICS

TEACHING POSITIONS

Consultants focus on providing the best possible classes to our clients, meeting their language needs and content expectations, and allowing them to reach their goal, while implementing Alcanza's mission, objective, strategy and methodology.

Consultants are encouraged and expected to develop the four English Abilities (listening, speaking, writing and reading) of clients, in order to expand their skills and to provide the best possible classes. To achieve this, consultants must be able to adapt to client's needs and interests.

- **Full-time administrative or/and teaching**

Full- time schedules for administrative positions and for teaching positions include various benefits and significant responsibilities to both the team and clients. As such, these

positions require high levels of commitment and trust.

- **Part-time consultant**

Hourly contract depending on individual's needs and availability, as well as teaching demand on Alcanza's end. Flexibility in schedule and number of teaching hours per week.

- **Independent consultant**

A freelance position that may include flexwork and teaching hours according to the individual's availability, sharing the values and expectations of the organization.

***All positions must inform Operations of their Hours of availability, weekly.**

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PLATFORMS

G-SUITE

G-Suite is the basis for our work/teaching platforms and contains a number of programs that we utilize in coordination with other team members. Every team member needs to have an active gmail account, and we recommend downloading various applications on mobile devices. Applications necessary for consultants include: google calendar, google docs, gmail, google meet, google class and google forms. Working through this platform allows our team to collaborate effectively and efficiently.

Gmail

Gmail is our official form of communication regarding schedules, team member concerns, suggestions, time off, complaints or meeting requests. The time expectation for a reply is 24 hours, and team members are expected to acknowledge that an email has been received. Emails should be professional, concise and directed to relevant

team members in the organization.

The Alcanza Website/ Platform

[Alcanza Consultants](#)

The platform is preloaded with all client documents and materials required for individual remote classes.

Your username and password will be provided by your Direct Leader.

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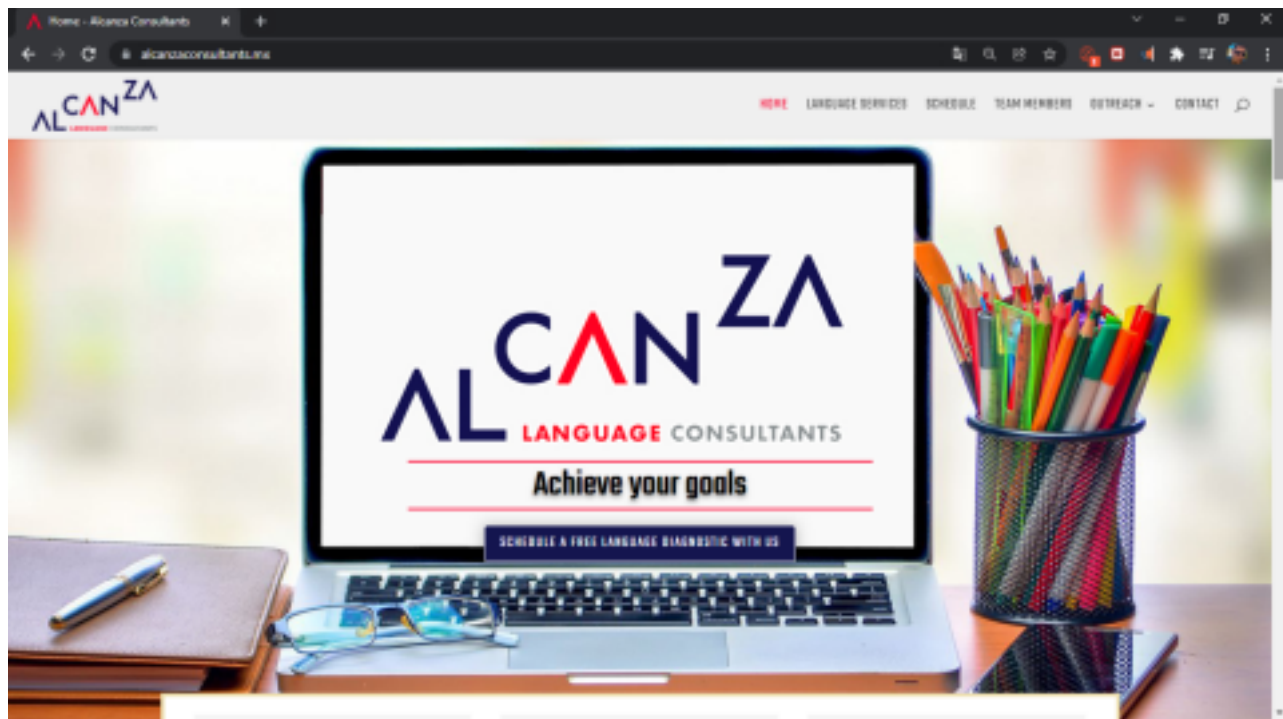
Client documents

1. Lesson plan
2. Remote

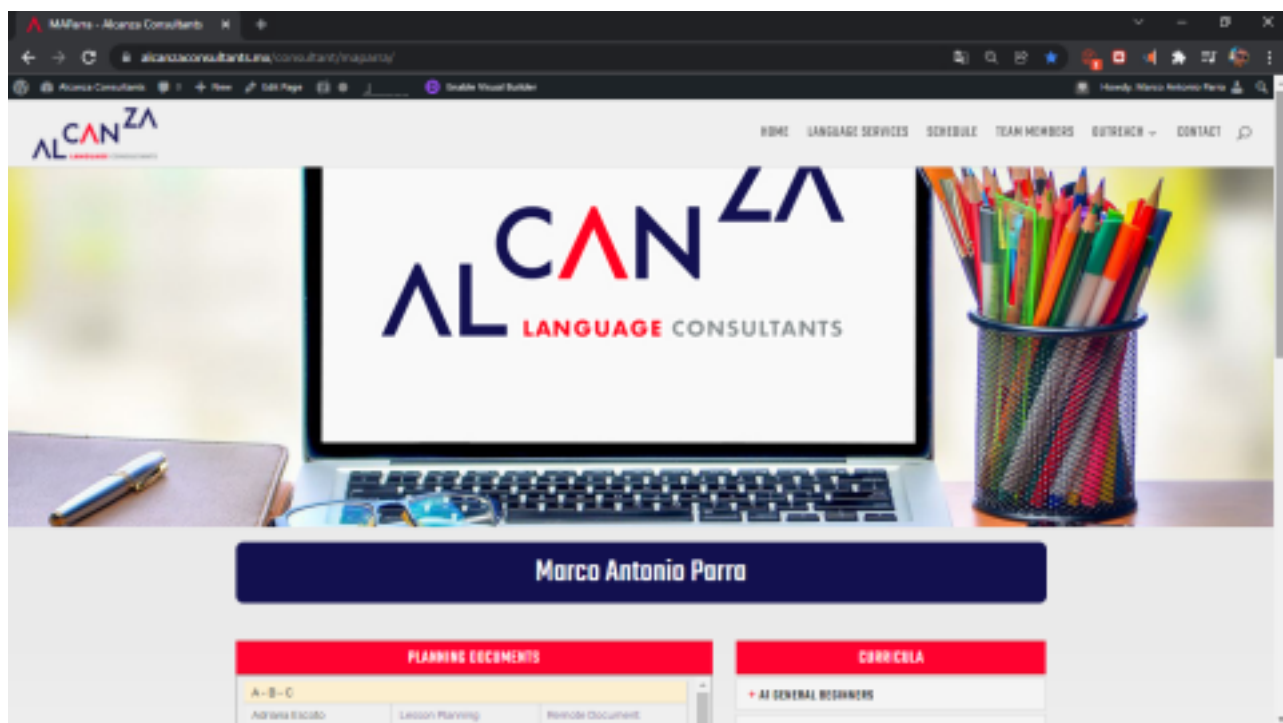
Curriculums

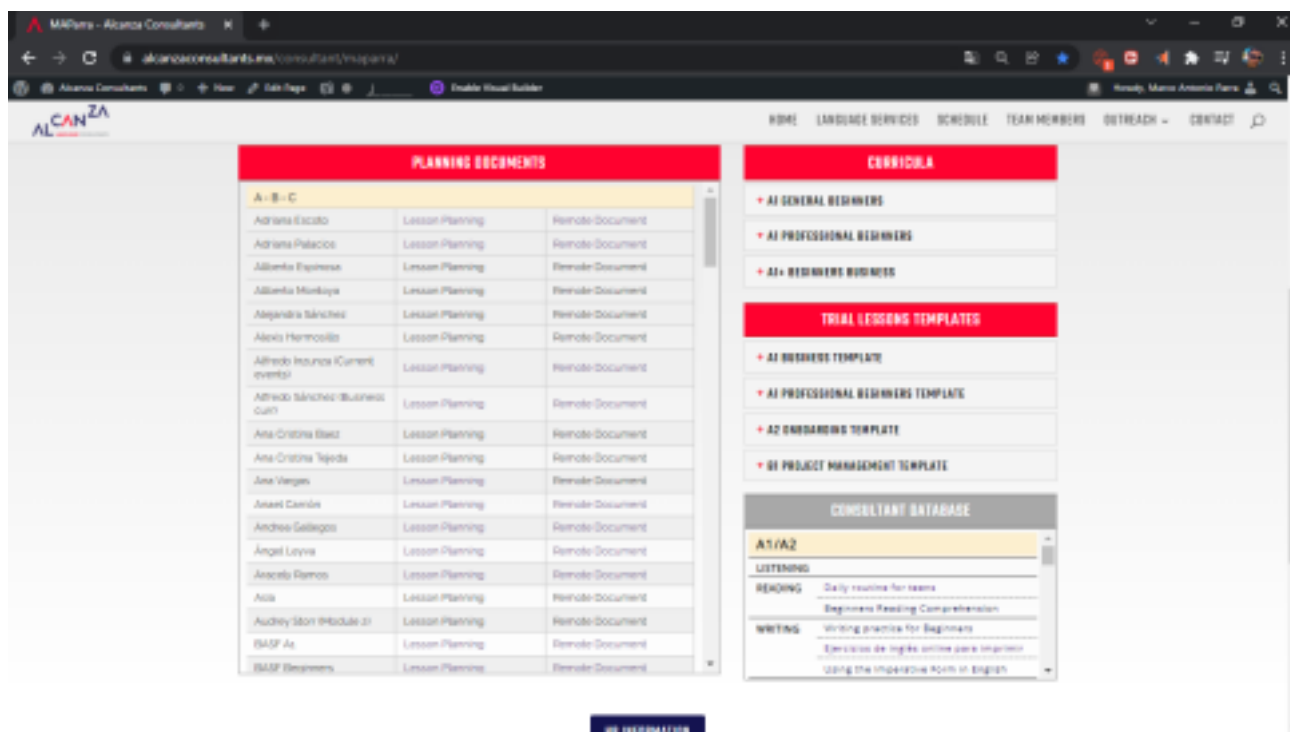
Teaching Resources:

- i. Links and materials for classes
- ii. Training materials
- iii. consultant chats notes and resources



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Google Calendar

Alcanza uses Google calendar to assign classes, meetings and training sessions. Operations creates a personal calendar for each team member, allowing the consultant

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to know of any changes and modifications that may happen during the week. It will be necessary for a consultant to review their calendar on a daily basis, as classes and times may change. We recommend that you download the calendar on your mobile device. The calendar is updated every Sunday evening. Classes will appear as events and contain pertinent logistical details, such as time, location, contact number and client name. Further details on how scheduling works are in the next page under “operations.”

SLACK

Slack is the official communication platform to reach team members for work related

matters. Therefore, all staff must download the Slack App on their smartphone or other device. After downloading it, you will receive a notification via email to join the Alcanza workspace invitation. Slack allows team members to compartmentalize their work conversations and personal conversations in different platforms.

Channels in Slack

Channels allow us to create “groups” for specific purposes. Certain members of the team are part of each channel, according to the objective and channel content.

Direct messages in Slack

Direct messages are the one on one messaging option that Slack provides, you can find your contact list at the bottom left corner of the screen. Groups can also be created by adding members in the setting option.

Personalizing your profile

Slack provides the option of adding a picture, status and personalized name to your profile, very similar to other messaging applications.

Notifications

Slack has several options regarding notifications, for example, it allows you to establish a notification schedule. Please make sure that your notifications are on during your

work schedule.

Expected response time

We expect team members to reply within 2-4 hours after a message was sent within availability hours. The detail in the response can depend on the matter and urgency of the text, for example: when a text’s purpose is to remind a team member of an event, the Consultant can reply by sending an emoji or reaction to the message, this notifies

the other party that it was read and acknowledged. In case the Consultant is unavailable for a conversation, they should notify the person who reached out and schedule a different time to address the message.

Whatsapp

Expectations for full time consultants

In order to provide our team with personalized support, the teaching team is divided into two smaller groups led by **Academic managers**. Your team leader's role is to provide guidance and support during the week when requested for lesson planning purposes, and lead the Friday Meetings to go over Alcanza's teaching KPIs, the consultant checklist, as well as bi-weekly Teacher Chats and independent training, which are mandatory.

LESSON PLANNING COMMUNICATION STRATEGY

In order to give our consultants more autonomy, we provide all consultants with detailed curricula and lesson plans, including AIMS and LANGUAGE FOCUS, but leave material selection up to the consultant, so the consultant can select the best materials and adapt the lesson to the client's needs.

All full-time consultants are expected to share the Lesson Planning documents and Remote documents with their Academic Manager for **ONE teaching day A WEEK**. New hires (first 3 months) will share all their lesson plans.

They are also required to record and share the recording with their Consultant Manager when assigned.

Your team leader is the person who you communicate with regarding any questions or doubts about lesson planning. For Clients who are off curriculum or study plans please feel free to reach out to your Manager for more details.

Academic Leader will individually reach out to the members of the teaching team and ask the consultant to record one of their sessions of the week. Before recording the consultant must request authorization from the client by explaining that this is part of their teaching growth and training.

KPIs

In order for us to keep track of team / consultant performance, KPI meetings are scheduled every Friday. Attendance to KPI are as follows and based on position.

Full-time consultants are required to attend weekly KPI meetings. If they cannot attend, they should send in their weekly KPIs via Slack message to Academic Leader.

Consultant Class Responsibilities

KPI meetings are focused towards improving our services and our clients learning potential and overall experience. The following document is a set of responsibilities that each of our consultants must follow in order to maintain customer satisfaction:

Add final draft kpis

TRAINING & GROWTH

We recognize that teaching requires constant growth, development and training; therefore we are committed to the development of our team members. At Alcanza we have a diverse selection of sessions, such as: Onboarding, Training and Tchats. In the following you'll find their definitions as well as attendance expectations for each.

Onboarding

First of all, the Onboarding training will provide the consultant with the necessary abilities in order to perform classes that will include, in accordance to Consultant's availability, at least 1 training per week. Consultants going through Onboarding will reach **a total of 12 training sessions** in order to start working with more clients. A failure of meeting the basic training established by the leader will affect class assignment.

TRAINING

In terms of training, to ensure all consultants possess the necessary skills and knowledge, we require attendance at training sessions. This means that the broader the Consultant's developed skills, the bigger the chance to work with more clients. Here's a breakdown of attendance expectations for trainings:

Full-Time/Part-Time Consultants: You must attend all scheduled training sessions that fall within your availability and that don't conflict with any classes you might be teaching.

Freelancers: You are required to attend one training session per month. We will

communicate the specific training session in advance through the Academics department.

ESL CHATS

Individual 30 minute sessions for new consultants with your team leader to go over a previously selected topic, they happen ideally within the first month of employment . Prior to the session, your team leader will share a topic and initial materials for you to prepare (article/ video), please review the material and do further research. The expectations for the session are to go over doubts and questions on the topic (15 minutes) and apply it to current clients (15 minutes).

TEACHER CHATS

Biweekly Meetings of the teaching team with the Academics department to discuss

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specific ESL skills, client situations or general concerns. These are collaborative sessions that usually take place every two weeks to develop the abilities of the teaching team. Attendance is not optional for Full-time consultants and Part time consultants, as long as the time slot is available in their availability sheet and they don't have a class at the same time, in case the consultant is not able to attend a video will be sent and the consultant will have to report back to their leader. On the other hand, Freelancers will be required to attend at least **once a month**.

MENTORSHIP

Our mentorship program pairs senior consultants with newer consultants to provide guidance and support. This program aims to help newer consultants develop specific skills relevant to their classroom teaching. First we focus on Skill Identification: Team leaders will identify specific skills each newer consultant needs to develop based on their performance or goals. This skill will be communicated to the assigned senior consultant each week. About the Mentorship Sessions, the frequency and format of mentorship sessions will depend on the identified skill, therefore the sessions can be held weekly and can be conducted via meetings, email, or messaging platforms. Finally the Senior consultants are responsible for reaching out to the assigned newer consultant and will be assigned a maximum of two mentorship pairings per week.

The final goal of this program is to improve skills for newer consultants, so they will gain valuable insights and guidance from experienced colleagues. As well as supporting a collaborative learning environment for all consultants.

Continuous Development

At Alcanza Consultants, we believe in fostering a culture of excellence, recognizing outstanding performance, and rewarding our consultants for their contributions to our success. Our Skills Training / Continuous Development system serves as a framework for acknowledging and celebrating the achievements of our consultants and promoting a culture of continuous improvement and professional development.

The number of training you complete will dictate the types of classes or clients that you will be able to take, the more diverse your skills are you will get more interesting classes with professionals and VIP clients.

We have around 60 different trainings to support our consultants, some of them include: Teaching Young Learners, Teaching Business English, Connecting Materials to Client's Needs, as well as training on teaching different skills such as writing, vocabulary, pronunciation, etc.

In summary, our training system is an essential component of our commitment to excellence, accountability, and professional development.

TRAINING MATERIALS

In the [☰ Onboarding Process Checklist](#) you can find the main resources that will be used to all stages, from the Onboarding phase, regular training, and chats.

We also have a Youtube Channel

(<https://www.youtube.com/channel/UCi9rPR5A72vQytg1Xlp8KeQ>) with different playlists that include the videos we often use as part of curriculums and classes.

BRAINSTORMING SESSIONS

One-on-one, one hour meetings that the Academics Department will assign with the consultant and our Manager team. Afterwards, Academics will connect to determine the success of the session. Requested materials may vary according to the topic of the session and the coach.

TEFL CERTIFICATION

We support our consultants with the necessary tools to become qualified language consultants. We provide our consultants with the TEFL course. TEFL (Teaching English as a Foreign Language Certification) is the globally accepted qualification to teach English abroad. The TEFL certificate reimbursement may go from 50-100% depending on the type of contract you have. Management will reserve the right to offer the course to any individual who qualifies for this certification and the availability of the TEFL

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group. To qualify, a consultant must have the following:

- A minimum of 3 months working with the company
- An active contract.
- Be actively teaching.
- For full time team members the certification is covered by Alcanza if the benefits of the content support the team member's role.

ALCANZA METHODOLOGY

At Alcanza, we combine a series of methods that allow the clients to develop their abilities taking into consideration previous knowledge and daily routines. We make use of two main strategies: **Task Based Learning and Functional Language Approach.**

TASK-BASED LEARNING (TBL)

Task Based Learning is based on the student's previous knowledge of a subject and the consultant's guidance, such as vocabulary and expressions. The task is presented to the student who will use their prior knowledge plus the tools presented to them to solve the task at hand.

After solving the task, the consultant proceeds to check for any common mistakes, if any. Afterwards the student is guided through the mistakes, the task is once again completed with the modifications.

All of Alcanza's programs are based on the TBL method, and the specific task of each lesson can be found under the term "aim" in all our lesson plans.

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FUNCTIONAL LANGUAGE APPROACH

This methodology adapts all tools and teaching materials according to the level and

needs of each client. The aim is for learning to be achieved through the realization of tasks and daily situations (workplace, social, or personal situations). Student participation is increased due to the focus on real life application of the language learned.

These functions vary, from personal use as suggestions, apologies, invitations to job related situations involving interviews, presentations, procurement, requirements and evaluations as well as quotes to a service provider.

The functional part of the method is the combined use of grammar, vocabulary, structure and pronunciation that go hand in hand with each situation/task/project realized every day.

More on specific teaching practices :

 **Alcanza Consultants' CLASS COMPONENTS**

CLASS PROCEDURES & PROCESSES

CLASS PLANNING

STEP 1: CHECK YOUR GOOGLE CALENDAR

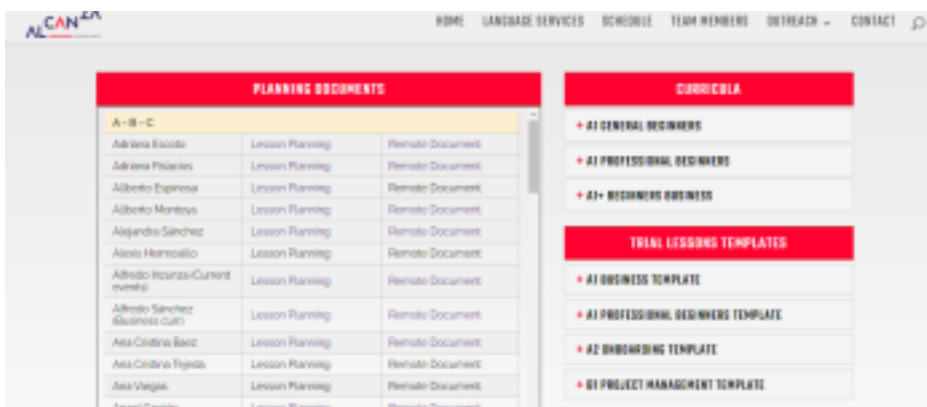
Every **SUNDAY evening** a confirmation text of assigned classes will be sent to the Slack channel #classes. You can check your google calendar and the lessons assigned to you for the following Monday. Lessons for the rest of the week will be assigned each Monday.

If any other class gets assigned during the week, it will be based on your previous availability and you will be contacted directly by Alcanza Line for confirmation.

If you have any doubts or issues with your schedule please reach out to your Consultant Manger or the Alcanza Line at least 6 to 8 hours before the lesson.

ALL CONSULTANTS ARE RESPONSIBLE FOR LESSONS IN THEIR SCHEDULE.

STEP 2: OPEN THE WEBSITE TO FIND CLIENT'S DOCUMENTS



All of our clients documents (Lesson Planning and Remote) can be found through your Website Login (given on the first day with Alcanza). If you for any

reason cannot find the client,
please contact your Consultant
Manager.

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STEP 3: OPEN THE LESSON PLANNING DOCUMENT

SPECIALIZED CURRICULUM - LESSON PLANNING			
Student: Coppel DAMAS group Classes per week: 3 Position: Administrative Level: A2 Curriculum: Coppel damas specialized curriculum Business + Current Events 1, 1p Current week:4-8			
Decompress:			
Here's the template: Needs analysis/Decompress template			
Notes on Client (Changes on new curriculum, suggestions, needs another curriculum, etc.):			
Remember to notify your leader when decompress is completed, or contact directly with Jaime via Slack			
Week 1 -			
Aims:			
TOPIC & CONTENT	LANGUAGE FOCUS	PRODUCTION	MATERIALS / SKILLS
Date/teacher: march 19th, Bernardo			

Once opened, check the **current week and next blank lesson** you are to teach. Here you can find the lesson aims, language focus and some material suggestions (optional to use). **Put your name and date of the lesson** you are teaching and check for any comments from the previous consultants or academics (notes at the top of the document).

STEP 4: OPEN THE REMOTE DOCUMENT AND PLAN YOUR LESSON

Now that you have all the information about the client and their program, as well as the current topic and next lesson, you can **start planning out your class** based on the aims and language focus outlined in the lesson planning document (also add them to the Remote).


You can be creative and have fun planning! Also feel free to check out previous plannings to get a better picture of the previous lessons, as well as the material section on the Website for some ideas.

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STEP 5: SHARE YOUR REMOTE WITH YOUR CONSULTANT MANAGER

All full time Consultants are required to do so **ONCE a week**. All part time, independent and new hires (first 3 months) are required to do so for **ALL THEIR LESSONS DAILY**. You should send the links to your Remotes **at least 6-8 hours before the lessons happen**.

All Consultants are encouraged to suggest improvements or adaptations to the curriculum through Academics.

 **Lesson Plan Components 2025.pdf** The following document is an explanation of each component of the lesson plan.

The **APPENDIX** contains a sample lesson plan used in an actual lesson.

CLASS STAGE

- To reach the client please consult the calendar event. There you can find email, phone number, and name.
- Send a message via Whatsapp 10-15 minutes prior to the class to confirm the class and for the client to make the necessary arrangements (connect, open documents) to get started by the scheduled time.
- Share the link you prepared for your class with the Alcanza Line and the client.
- Have the client's remote document ready for sharing (if necessary).

 Consultant shortcuts-2025.pptx.pdf

Remote document usage

This document has three main purposes:

- Providing the client with a space for note taking and class development.
- Being a review resource for after class and evaluation preparation.
- Giving upcoming consultants a better understanding of the class for lesson planning purposes.

For more details on the Remote document consult :

 **Remote document color code and components**

When a client is not comfortable with the remote document and/or has difficulties to use it due to connection issues, we can use alternative ways of instruction such as voice

notes, screenshots, phone calls, etc.

Troubleshooting


Troubleshooting refers to the process of identifying, diagnosing, and resolving technical problems that consultants or clients may encounter while using our online platform.

These problems can range from simple issues like login difficulties to more complex connection issues or software malfunctions.

Troubleshooting is crucial for a smooth and successful online learning experience.


Since it minimizes disruptions, by identifying and resolving technical issues quickly.

This allows them to focus on their core tasks without frustration. It also ensures clients satisfaction, reliable and functional learning platform contributes to a more positive and satisfying experience for both clients and consultants. Here's a guide to explore this further:

 Troubleshooting quick guide 2025.pdf

POST-CLASS STAGE

- After teaching your class, please update the lesson plan document with any modifications and comments that may have come up during class. Remember that these will be read by the following consultant who teaches the same client.
- A Homework assignment and class comments/suggestions are mandatory.
- Communication with Clients after class should only be for homework purposes. Interactions outside of these specifications must be reported to the Alcanza Line and/or the Client Incident form.

Please consult our Best Practices for more detail on Alcanza Consultant's policies regarding lessons. -  Best practices 2025.pdf

OUTREACH & VOLUNTEER PROGRAM

The Alcanza Volunteer Program was formed in June 2018. It is a non-profit program formed by a group of individuals who promote activities in our society to assist, empower, change, and transform our community through collaborative efforts. Our focus on language interaction guides the majority of our projects, but we seek to

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provide the maximum benefit for our community. We encourage every consultant to be part of our volunteer program or participate, if you are interested, please reach out.

THIS ARE OUR ACTIVE VOLUNTEER PROJECTS IN CULIACAN:

- Building Bridges (Proeduca)
- Book Club (Biblioteca del Jardín Botánico)
- Conversational Club (Biblioteca del Jardín Botánico)

For more info about the Program and our Projects please reach out directly to Ryan Storr.

APPENDIX

 **Part time consultants - Teaching KPIs checklist 2025.pdf**

 **Alcanza Dress Code**

 **Alcanza Consultants Terminology .docx**

By signing here I confirm to have read and agree with the terms and policies
listed above

Consultant's Signature