

Employer Internship Toolkit

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Internship Toolkit

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Sample Internship Job Description

Primary Purpose

The purpose of the Internship is twofold:

1. **[Company Name]** will aim to provide the intern with a rich, meaningful and realistic experience allowing the intern to gain insight into the company and the industry.
2. The intern will **[insert description of what the intern will do. Example: provide support and assist Relationship Managers with client service]**.

Position Responsibilities (Examples)

[Company should develop 3-5 key responsibilities for the intern. The below bullets are provided as an example]

- Work with Manager to assist in day-to-day sales responsibilities, to include: pre-call planning, industry research, preparing pitch books and presentations, joint calling, etc.
- Gain familiarity with the Underwriting Process. Meet and work with Risk Partners on key deals as identified by Manager or RM.
- Obtain understanding of other product offerings. Shadow and assist Key Product Partners
- Lead the development, organization and implementation of a Marketing Event.
- Conduct research on XX to provide a comprehensive overview and present to XX. Product an associated fact sheet to be shared with XX

Project At-A-Glance Worksheet

Manager and Intern will complete the following worksheet near the beginning of the internship to further define the specific projects and agree upon expectations, deliverables and check-in meetings.

What specific projects/assignments are in scope for the internship duration?

-
-
-

Outline a timetable for completion or major milestones.

Clearly identify both Manager & Intern Expectations and Deliverables.

- What support does the intern need to be successful? (Introductions, System Access, Training, etc.)

- What kind of outcome would the Manager like to see upon completion? Be specific regarding desired project, solutions, recommendations, etc.

How often will you meet to "check-in"?

- Who else can the Intern go to with questions? To remove roadblocks? To check progress?

Roles & Responsibilities

Manager

- Ensure that the internship experience is mutually beneficial to both the intern and the company.
- Align necessary resources and tools with the intern to ensure they are set up for a successful, meaningful experience (systems access, work station, training, etc.)
- Educate Teams and Partners on the intern's role. Encourage them to involve the intern in assignments and projects where applicable.
- Provide direction on specific job duties.
- Determine performance objectives.
- Conduct conversations with intern to help prepare them for career or professional aspirations.

Contact/Mentor

- Serve as an informal mentor to the intern.
- Provide perspective on aspects of the job that the intern may find challenging. Provide context and connectivity.
- Help the intern to navigate through the company's systems and processes.
- Assist with introductions to key partners and senior leaders.

Intern

- Actively participate and meet the requirements set forth in the job description.
- Participate in Team meetings or Partner meetings when applicable.
- Seek out networking opportunities while at **[Company Name]** if interested.
- Ask for assistance from Manager/Mentor when needed (regarding clarifications, roadblocks, unrealistic expectations, etc.)
- Ask for frequent feedback on performance – both positive and negative.

Appendix A: Intern Performance Evaluation Guide

INTERN NAME	_____	DEPARTMENT	_____
START DATE	_____	END DATE	_____
POSITION	_____	HIRING MANAGER	_____

Directions:	<p>This document is designed to assist you in performance planning and evaluation for summer interns. It utilizes SMART Goals and incorporates a 5-point rating scale.</p> <p>A copy of this document should be filed with the internship personnel records at the completion of the Mid-Summer and End-of-Summer evaluation period.</p>																								
Set SMART Goals	<p>SPECIFIC goals result in defined actions and objective evaluation. When a goal is vague, it is hard to break it down into executable actions, and impossible to know whether it's been reached or not.</p> <p>Goals need to be MEASURABLE. Not only does a measurable goal lead to meaningful evaluation, it also points to tangible evidence of progress, which provides encouragement while working toward it.</p> <p>Set goals that provide enough challenge, but are also realistic and based on meaningful work. An ATTAINABLE goal is motivating instead of intimidating.</p> <p>Goals must be RELEVANT to the intern's job responsibilities, and should align with higher-level strategies and success of the team, the business unit, and the company. If a goal does not contribute to higher-level success, then it is not relevant.</p> <p>A TIMELY goal has identified timelines for completion and interim milestones.</p>																								
Example: Performance Rating Scale	<table border="1"> <thead> <tr> <th></th> <th>Rating a specific goal</th> <th>Rating a specific competency behavior</th> <th>Rating overall performance</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Unacceptable Performance</td> <td>Significant Development Need</td> <td>Unacceptable Performance</td> </tr> <tr> <td>2</td> <td>Approaching Effective Performance</td> <td>Development Need</td> <td>Approaching Effective Performance</td> </tr> <tr> <td>3</td> <td>Good Performance</td> <td>Effective</td> <td>Good Performance</td> </tr> <tr> <td>4</td> <td>Excellent Performance</td> <td>Strength</td> <td>Excellent Performance</td> </tr> <tr> <td>5</td> <td>Exemplary Performance</td> <td>Significant Strength</td> <td>Exemplary Performance</td> </tr> </tbody> </table>		Rating a specific goal	Rating a specific competency behavior	Rating overall performance	1	Unacceptable Performance	Significant Development Need	Unacceptable Performance	2	Approaching Effective Performance	Development Need	Approaching Effective Performance	3	Good Performance	Effective	Good Performance	4	Excellent Performance	Strength	Excellent Performance	5	Exemplary Performance	Significant Strength	Exemplary Performance
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Task-Oriented Performance Goals

Project/Assignment Performance Goals	Intern Activities	Manager Assessment	Rating				
			1	2	3	4	5
		Mid-Summer Comments:					
		End-of-Summer Comments:					
		Mid-Summer Comments:					
		End-of-Summer Comments:					
		Mid-Summer Comments:					
		End-of-Summer Comments:					

General Performance Objectives

OBJECTIVE	MID-SUMMER						END OF SUMMER					
	Category Rating						Category Rating					
	NA	1	2	3	4	5	NA	1	2	3	4	5
Has an adequate amount of technical knowledge to perform the assigned tasks.												
Has an adequate amount of business knowledge to perform the assigned tasks.												
Is able to work with little to no supervision.												
Is punctual and dependable and is available for work during the agreed upon time schedule.												
Is able to effectively communicate in both written and verbal formats.												
Is well prepared for assigned tasks.												
Participates in all scheduled meetings and activities.												
Is inquisitive and takes appropriate steps to gain insight on assigned tasks.												
Provides complete and quality work on all assigned tasks.												
Effectively performs analysis skills and thinks creatively when faced with business and relational problems with teams, customers and peers.												
Identifies opportunities and takes action to build relationships between ones' area and others in the organization.												
Displays ethical behavior at all times.												
Demonstrates an active desire to learn.												
Accepts and makes positive use of constructive feedback.												
Is cooperative, flexible and adaptable.												

Appendix B: Organizational Charts

<Insert Team Org Chart>

<Insert Any Other Applicable Org Charts>

Appendix B: Key Partner Guide & Contact List

[Customize this list-based internship needs and organization]

Key Partners	Name(s) & Contact Info	Description/Overview <i>(Primary Role, Product/Service, Partnership with Sales Team, etc.)</i>
Sales Director		
Relationship Manager		
Assistants		
Regional Manager		
Partner		
Human Resources		
Mentor		