

Enterprise-Wide System Training for a Major Financial Institution

SITUATION

A leading banking and financial institution in Hawaii with over 2000 employees, was undergoing a significant platform transformation to enhance digital services and support future growth. The bank was determined to maintain the excellent service customers had come to expect so they had a critical need to ensure all employees—from customer-facing staff and back-office personnel to leadership—could seamlessly transition to and proficiently use the new digital platform from its launch.

LPI Solutions was brought on as a partner to develop and implement a comprehensive training program that equipped all employees with the necessary skills and knowledge to effectively use the new system.

HOW WE HELPED

Training Plan and Strategy Development

We partnered with the bank's operations training team to assess learning needs and design a training plan and strategy that was both comprehensive and tailored to the specific needs of different roles and divisions. Unlike many systems trainings that are organized by system menus and architecture, we decided to organized learning material to align to employee day-to-day workflows and tasks. We also incorporated business guidelines and requirements, along with system steps, so employees would have a complete understanding of the new processes.

Multi-Faceted Learning Material

The bank was committed to the success of employees and supported a multi-faceted approach to learning. Materials developed included:

- **Resource Site:** Developed an easily accessible online resource site where employees could find all learning materials.
- **Job Aids:** Created concise, easy-to-follow job aids for quick reference.
- **Video Demos:** Produced high-quality video demonstrations to visually guide learners through complex tasks.
- **Online Training and Simulations:** Offered interactive online training modules and simulations that allowed employees to practice in a risk-free environment.
- **Instructor-Led Training:** Conducted both virtual and live training sessions for role-based training so employees could practice and get real-time feedback.
- **On-the-Job Observations and Checklists:** Implemented observational checklists to ensure on-the-job learning and compliance with new procedures.
- **Knowledge Assessments:** Designed assessments to measure learning retention and identify areas needing additional support.
- **Change Management Newsletters:** Regularly distributed newsletters to keep staff informed about the training progress and changes, reinforcing key messages and maintaining engagement.

Upskilling internal training team

We also empowered and trained the internal bank training team so they could update and create new materials as needed. Training include topics such as: Articulate 360, Camtasia, Snagit, and vYond.

OUTCOME

The comprehensive training program helped to support a seamless transition to the new digital platform. Employees shared how the training helped to increase confidence in using the new systems, and that they continued to find value and used the resources after the system launched. The upskilling of the internal training team also positioned the bank to efficiently manage future updates and training needs, further supporting ongoing growth and digital innovation.