A leading Canadian retail bank has partnered with Assima to train 2,500 staff on a new application, enhancing mortgage services for customers and achieving cost savings of $3 million

THE CHALLENGE

To increase efficiency and improve the customer experience, a major Canadian retail bank is streamlining its mortgage application process, which was previously manual and paper-based. As well as making the process more efficient, the changes will allow the bank to give customers a decision on their mortgage application quickly, in one meeting.

Key team members from the bank created a new, 11-step mortgage approval process for branch staff to follow. With all official documents needed to support the process scanned rather than stored, the new process eliminates the need for paper files.

After evaluating potential platforms to support the new mortgage process, the bank decided to deploy SAP. With each step of the process automated in the system, the bank needed to accommodate a major change in working practices for branch staff and other bank executives. Specifically, over three thousand staff needed to be trained on the new SAP CRM within a very challenging timeframe.

SOLUTION

As a first step, the bank initiated a program to build a dedicated training client to deliver the required training. However, the live system was changing constantly, and the development costs were prohibitive. The bank went to market for an alternative training solution that could prepare staff for the change quickly and cost effectively.

The bank estimated saving at around three million dollars

A number of training approaches were considered, including screenshot-based training systems and click-and-go simulation software. In the final analysis, however, the bank met its training requirements with the Assima Training Suite (ATS), which uses clones of the live SAP system as the foundation for interactive training exercises.

A team of developers from the bank used ATS to create around 20 exercises that take users through all the processes required for four different types of loan applications. In addition, around 100

AT A GLANCE

CHALLENGES

- Cumbersome, manual mortgage application process
- Customers had to wait for loan decisions
- Branch staff had to be trained on SAP to adapt to the new process
- A traditional training client was too costly to develop

SOLUTION

- Assima Training Suite
- Interactive training exercises based on clones of SAP
- Mix of classroom training and e-learning
- 2,500 staff trained in six months
- Training to be extended to the rest of Canada

BENEFITS

- Training savings of $3 million compared to a training client
- Reduced development time for training content with 'object manipulation'
- Interactive training helps build user confidence faster

fragments of additional SAP functionality were recorded in Assima to show users how to complete different steps that apply to different types of mortgages.

A mix of classroom-based training and e-learning was delivered to thousands of employees who touch the mortgage process using the Assima exercises. These include 2,500 branch staff, 70 members of the operations team, 15 insurance staff and 80 team members at the bank's contact center. Training was also delivered to 300 mobile sales professionals.

> ## 'Object manipulation' features […] helped to reduce development times significantly by enabling teams to work on clones without touching the live system

In the second phase of the project, Assima exercises will be used to train additional staff across Canada, including 500 branch employees, 100 mobile sales professionals, 30 operations staff and around 20 risk and marketing staff.

RESULTS & BENEFITS

With the Assima tool, the bank has achieved dramatic cost savings compared to developing, deploying, supporting and refreshing a traditional training client. A spokesperson from the bank estimated these savings at around three million dollars.

> ## The multi-lingual capabilities of ATS […] will ensure a consistent training experience in both languages

As an additional benefit, ATS makes it much faster, easier and less expensive to keep training exercises up to date as changes are made to the live application. Core application functionality is simply recaptured in Assima when necessary, ensuring that training reflects all the latest developments.

The 'object manipulation' features of ATS helped the bank create training exercises quickly and cost effectively, with no need to access the live SAP application or re-record its functionality. This helped to reduce development times significantly, by enabling teams to work on clones without touching the live system.

The multi-lingual capabilities of ATS have been a huge benefit to the bank. Glossaries are currently being added to Assima clones to support automatic translation of French training exercises into English. As well as being fast and cost effective, this approach to translation will ensure a consistent training experience in both languages.

> ## With screens that mirror the live system, employees could experiment with different controls, use drop down menus and get hands-on experience of the new system

Assima played a central role in the success of this major training program. With screens that mirror the live system, employees could experiment with different controls, use drop down menus and get hands -on experience of the new system. This helped to ensure a smooth transition to SAP, with employees prepared to work with the new system from day one.

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