

A major global retail bank trains over 5000 staff in Germany quickly and cost effectively with Assima Training Suite, supporting a seamless and efficient transition to a globally standardized core banking system

THE CHALLENGE

Banks and other financial services organizations need to standardize their systems and processes globally to maximize operational efficiency and streamline compliance with ever-changing regulatory controls. This is the case for one leading retail bank, which has 180,000 employees and 80 million customers in 40 countries and manages more than \$1 trillion in deposits and customer funds.

The bank has grown quickly in recent years through acquisition and has inherited a costly, heterogeneous IT environment. To reduce operational and support costs and achieve new economies of scale, the bank is standardizing its core banking system worldwide.

With nearly all of the bank's mission-critical activities depending on the core banking system, from customer and account management to accounting and reporting, staff needed to be fully trained on the new software before it went live in each country. To ensure that over 5000 staff in Germany were ready in time, the bank planned a major training program based on a blend of classroom sessions and e-learning.

SOLUTION

The bank's training team in Germany researched the market for a training solution that would prepare staff to use the new core banking system. The bank decided that stand-alone training clients – versions of the live app used for training purposes – would have been too difficult and expensive to host, maintain and update. The team then looked at static, screenshot-based systems, but these were unable to provide the interactive training experience employees needed to gain confidence using the new system.

Proprietary data such as customer names, addresses and account numbers can be removed from training modules, which helps to protect the bank and its customers

To overcome its training challenges, the bank decided to deploy Assima Training Suite (ATS). ATS takes a unique approach to building and delivering training content, creating clones of the live core banking system and using them as the foundation for interactive training modules.

AT A GLANCE

CHALLENGES

- Train over 5,000 staff on the new core banking system
- Speed up development of required training modules
- Minimize training costs

SOLUTION

- Assima Training Suite (ATS)
- 450 interactive training modules
- Classroom training delivered in phases
- Training modules anonymized quickly and easily to protect bank and customer data
- Delivery of Assima training modules online via bank's SABA learning management system

BENEFITS

- Over 5000 staff trained quickly and efficiently
- Cost of developing training modules reduced by 30%
- More effective, interactive training
- Training modules updated quickly and easily with Assima's unique cloning functionality
- Training costs reduced with one set of modules for classroom and online delivery
- Maximum security for bank and customer data

A team of in-house developers from the bank worked with Assima technical experts to clone key core banking system functionality and built more than 450 learning modules for employees.

Total time savings of 30% compared to creating and maintaining screenshot-based training materials

While updating training clients and screenshot-based training is time consuming and error-prone, ATS speeds up the process. When changes are made to the live application, the team simply captures them in the Assima training modules, with no need to rewrite the content from scratch.

ATS also makes it faster and easier to remove sensitive operational and customer data before delivering training, which has been a major benefit for the bank. Instead of stripping out data manually, which is a requirement for stand-alone training clients, ATS clones can be anonymized automatically. This means that proprietary data such as customer names, addresses and account numbers can be removed from training modules, which helps to protect the bank and its customers.

Offline versions of the ATS training modules were used by trainers to deliver 540 seminars for employees during phased training “waves”, with 5,600 employees trained in total. The

Assima training modules were also made available to employees 24-hours a day as e-learning exercises on the bank’s learning management system, SABA, to help reinforce the classroom-based training.

If an employee gets stuck while working through a training module online, they can access help cards that explain the next step. In addition, they can choose to access the ATS modules in demo mode which takes them through the exercises step by step. This ensures that employees complete modules effectively on their own, and they can also use these resources if they get stuck using the live system, helping to reduce support calls.

RESULTS & BENEFITS

With ATS, the bank was able to train over 5,000 staff across Germany quickly and cost effectively, giving them the skills and confidence they needed to begin using the new core banking system. This ensured continuity for critical, customer-facing banking processes, while helping the bank consolidate its systems globally, optimize operational efficiency and reduce IT costs.

Training development savings of 30%

With Assima’s unique cloning approach, the process of developing and updating training modules is much faster and more cost efficient. As well as creating the underlying clones faster, ATS has functionality for automatically generating user instructions, including help cards, which delivered major time savings for the training team.

Across the development of all 450 modules, the bank estimates total time savings of 30% compared to creating and maintaining screenshot-based training materials.

More effective, interactive training

Because ATS modules exactly mirror the functionality of the live core banking system, and provide an interactive training experience, employees were confident working on the new live application from day one of the deployment. This ensured that the software migration had no negative impact on the bank’s business activities or customers.

Delivery cost savings

With no need to host stand-alone training clients, ATS has helped the bank to reduce training delivery costs compared to traditional training clients, especially in terms of IT infrastructure and support. In addition, delivering training modules centrally instead of hosting them on distributed hardware servers increases system security.

Employees were confident working on the new live application from day one of the deployment

The bank also has a single set of training modules for classroom-based training and online training with ATS. This means that there is just one version to maintain and update across all delivery channels, which has delivered major administrative time and cost savings.

