

... CASE STUDY

Transforming Customer Care Onboarding for a Major Financial Institution



GP Strategies® improved new-hire experience for a financial services firm by designing a thoughtful solution that reduced dependence on training staff and facilities while significantly accelerating the onboarding timeline.

Challenge

Our client needed to transform their retail customer care center learning practice. Predominantly instructor-led classroom training (ILT), their program required hefty time and facilities commitments from staff. Training periods for newly hired customer care consultants were lengthy and had to be completed prior to placement. The new experience was to be flexible, not bound to traditional ILT. New hires would take more responsibility for their training, while staff served as coaches and guides.

Solution

We partnered with the client to design and implement a virtual learning environment (VLE). A single content hub for new hires, the VLE encouraged self-growth and peer learning, and allowed stakeholders to monitor employee engagement and progress.

Our agile, blended approach included:

- Self-paced formats (web-based training, self-study guides, and job aids)
- Digital simulations with guided demos and practice exercises
- Mentorships and live call training

Business Impact

We designed a program to successfully ease demand on the client's resources. But more significantly, under the new VLE, newly hired customer care consultants completed their onboarding and achieved full work readiness in less than half the time compared with the previous system.

RESULTS

New core onboarding program **reduced time to proficiency by 57%**

Loan servicing specialist training program **improved time to readiness by two days**

