

... CASE STUDY

Designing a World-Class Product Education Series Toolkit for a Global Bank

Challenge

To empower relationship managers (RM) and other bank employees with current, easily digestible learning on the various products offered, the commercial bank recognized a need for a new Product Education Series training. The target learners required just-in-time access to information on a wide range of Global Trade and Receivables Finance solutions to better support their customer conversations and interactions.

Solution

GP Strategies® created a suite of easily navigated, pitch-perfect, mobile-first, digital solution toolkits, with organized, essential product content by topic, all aimed at meeting learners at their points of need. Working with multiple client stakeholder groups, GP's teams designed content that's delivered in the flow of work and created learning moments that improve customer conversations, thereby driving revenue-generating opportunities and return on investment.

Business Impact

The feedback from the learning and business stakeholders has been overwhelmingly positive. After the release of the toolkits, the business was excited to have training that resonated with the modern way learners use and access information in the flow of work. The RM target audience group and the business teams who were first to use the training confirmed the ease of use and stated that the targeted content helped to enhance their product knowledge.



RESULTS

226,000 employees globally now have access to **relevant digital content** at their moment of need

5 toolkits with **74 individual micro-learning assets**, targeted at each topic, for easy access and navigation for learners

Mobile-first design with **global accessibility** to streamline the user experience

