



cambio solutions

**Case Study 2:**

Ian Williams

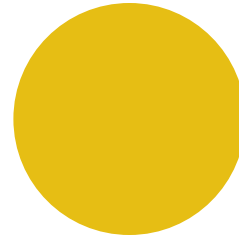
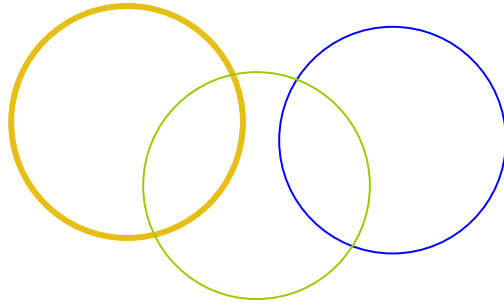
[www.cambiosolutions.com](http://www.cambiosolutions.com)

# Background and Overview



- Established, well known insurance business.
- Two new products being launched into the corporate market.
- Challenging timescale to launch.
- New back office business teams set-up to administer paperwork.
- Employees a mix of new recruits and internally transferred staff.

# My Role



- Specific responsibility for training delivery:
  - Induction
  - Products
  - Systems, Processes and Procedures
- To analyse training requirements, design training material to meet business needs.
- Deliver effective training to all employees within new business teams involving:
  - Workshops
  - One to one coaching

# The Challenges



- Limited timescale available to train all staff by ‘go live’ launch.
- New recruits - A mix of knowledge and expertise.
- A reluctance to accept a new way of doing things:
  - ‘At my previous company we did it this way’.
  - ‘I already know how to do this’.
- Availability of employees.
- Client Administration system.

# The Solution



- Induction (incl. Products):
  - 7 Modules covering different topics.
  - Employee workbooks and assessment tests.
  - Phased delivery via induction workshops.
- Systems:
  - User friendly guides and assessment tests.
  - Overview and navigational workshops.
- Processes and Procedures:
  - One to one coaching.
  - Model Office walkthroughs and testing.
- Progress dashboards, Competence checklists and Quality Checking (QC) sheets.

# Outcome



- Overall, successful delivery evidenced by progress dashboards, assessment and accreditation sign-off.
- Induction (incl. Products):
  - 100% trained. Target (100%) achieved.
- Systems:
  - 100% trained. Target (100%) achieved.
  - Successful accreditation of 85% employees (remaining 15% in 'wash-up' post launch).
- Processes and Procedures:
  - 88.42% trained.
  - Target (75%) exceeded. Outstanding – absences, sickness, management

# Feedback



- Positive feedback from Senior Execs in terms of overall % achieved within timescale.
- Quality and variety of training praised.
- Very good feedback from employees at each stage of training.