

The right training, at the right time, for the right people

Everyone's job would have to change. The way the sales force pitched life insurance policies to customers. ...How new applications were processed and approved. ...Responses of customer service representatives handling inquiries and resolving issues. ...The steps home office staff would take to navigate systems and administer insurance benefits.

When this blue-chip financial services company launched a new series of life insurance products, nearly 10,000 client employees would need to do their jobs differently. A lot was riding on the successful product launch, and there was no option to abort the mission.

The client's project teams were already at capacity, managing the product design, regulatory compliance, and changes to marketing. They needed a dedicated partner to translate the upcoming product launch's impacts into an enterprise-wide training program designed to meet all their employees' learning needs.

Clerestory led the financial services client from designing an initial training strategy through training development, delivery, and post-launch support. With EMBED change management guiding our work, we met with representatives from every department and team that might be impacted by the product launch. We captured the informa-

tion and skills they'd need to do their jobs well into the future. We created an Impact Assessment and used it to develop a role-based curriculum that outlined measurable learning objectives, audiences, timing, and delivery modes for each course.

Some courses would need to reach a decentralized workforce. We built interactive, on-demand e-learning modules and hosted webinars so employees could learn when it was most convenient for them.

Other courses required in-person dialogue and practical application of skills. We trained a team of client experts from across the company. With our support, they facilitated instructor-led training to guide their fellow employees throughout the change process. Other information needed to be accessible for teams to review at the point of need. Quick reference guides and job aids were designed to support learners before, during, and after the product launch.

Over 50 courses were developed and delivered by Clerestory to prepare our client's employees for the product launch. Working with the client's IT department, we created an online training hub to streamline access to course materials and to post related announcements. We managed deployment schedules, logistics, and communications, ensuring all 10,000 stakeholders received the right training at the right time. Clerestory's change management

principles were the North Star throughout the program, giving learners the vision, motivation, skills, and resources to do their jobs well. We applied adult learning best practices to make training memorable and effective. Lasting results were imperative so that teams would think, act, and interact differently.

We stayed on-call at the client's headquarters to help manage any last-minute challenges caused by the product launch. It was exactly the day we had worked hard to deliver. Quiet and undramatic. Doing business as usual, with new ways of working. That's what you can expect when your mission-critical program is conceived with the knowledge that "people have to change for companies to change."

We made change happen. We did it by preparing employees with the knowledge, skills, and mindsets to do their jobs well.



I was part of the last rollout in 2008, and this rollout far exceeded what was done in the past.

– Financial Services Field Support