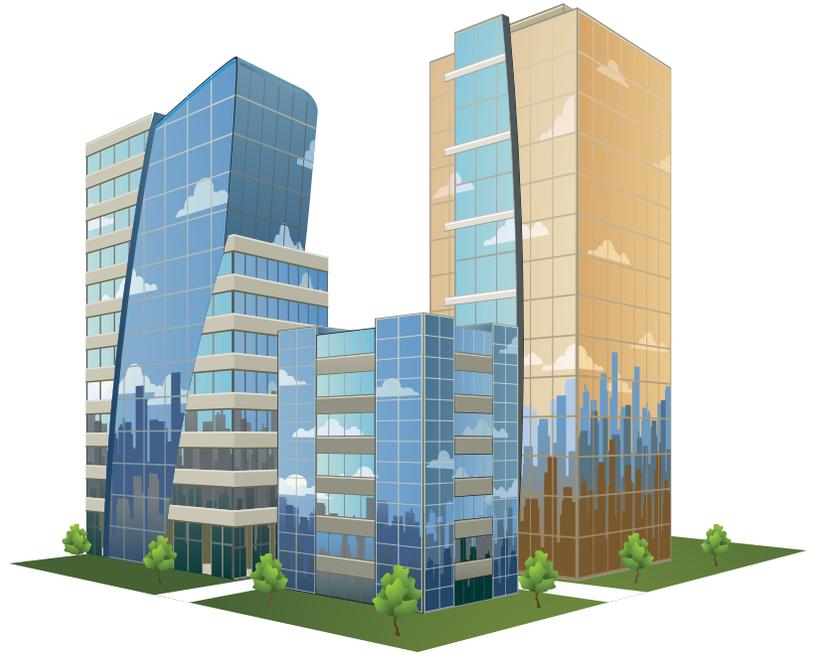




SUCCESS STORY: Financial Services Firm

The Client

A Fortune 500 financial services firm in the Midwestern U.S. sought to internalize its asset management and employee benefits call center operations as part of a corporate re-branding campaign. Call center jobs serve as an entry point for new hires to begin their careers with the company. Call center employees typically handle calls from client company employees and their relatives regarding benefits and claims.



Need / Challenge

Clarity's client is well-regarded as a great place to work, with a very positive and collaborative team atmosphere. The decision to internalize call center operations posed a challenge, as the client had one expert trainer, but no formalized curriculum to structure the five-week course. As new hires, students had to learn not only the financial products and how to handle different types of calls, but also the technical infrastructure which included many different computer systems and software programs. The lack of an organized curriculum led to gaps in employee skill sets, hampering call center operations and causing disharmony between the operations and training sides of the business.



Solution: What Clarity Did

Clarity's consultant brought considerable experience in organization development and learning management, and hands-on experience delivering Instructor-led Training. Crucial to success were several factors:

- Building and reinforcing relationships between the subject matter experts in training, systems infrastructure, and call center operations managements
- Formalizing the training with a written, structured curriculum that included engaging PowerPoint slides, hands-on exercises, and student assessment activities
- Creating a modular curriculum that could be easily expanded or modified as new technologies or processes were added to the business
- Enabling other trainers to successfully deliver the training to ensure business continuity

Also important to this project was building a bridge between the training and call center management to ensure that all parties could collaborate around the curriculum and new trainees could perform effectively after the five-week on-boarding class. Clarity's consultant brought finesse and experience to this, along with great flexibility, to meet with representatives from all departments concerned, often at unusual hours outside the normal business day. Furthermore, Clarity's consultant collaborated with the operations side of the organization to review all material and ensure their concerns were addressed.



Results: **The Outcomes**

The client said: “[Clarity’s consultant] has been a phenomenal partner on this project. She did a fantastic job of keeping me in the loop of progress, collaborating with my team and our business partners, and delivering a professional program that I am excited to use going forward. She also did a nice job of providing tools for us to leverage for other programs. Thank you for finding her for us! Things worked out perfectly.”



Breakouts: **Quotes**

“I’ve never worked in such a collaborative environment. People went out of their way to support each other. Each of the trainers had one another’s backs—stepping in, helping out and always speaking positively of one another.”



ABOUT



clarity
CONSULTANTS

Clarity has over a quarter century of expertise in placing elite learning and development professionals in high-demand positions in large, global organizations.

There is a reason why over eighty percent of Fortune 500 firms rely on Clarity to staff their projects. Our background, skilled consultants, and broad range of experience across industries and sectors help set us apart from the competition.

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