

SUCCESS STORY: FINASTRA



The Client

Finastra is a global technology company that develops and deploys innovative, mission-critical solutions for financial institutions. Its cloud-based, open architecture systems work together with customers' legacy systems to improve efficiency, agility, and data accessibility. Among the company's thousands of customers are many of the largest global banks.



Need / Challenge

Finastra reorganized its customer support groups, which originally were based in multiple locations throughout North America, into a Center of Excellence structure with staff co-located in just two new locations. This entailed hiring new, local staff who needed product and customer support training.

The product is complex. The timeframe for developing the training was only eight weeks. This meant that Finastra needed a large number of experienced Instructional Designers who were familiar with the financial and banking industries. Because Finastra's veteran support staff—who served as Subject Matter Experts (SMEs) for the Instructional Designers—were based in different time zones in North America and elsewhere, Clarity's consultants needed to be available during the SMEs working hours.

Finastra tasked Clarity's consultants with developing a two-week role-based classroom curriculum and a three-week program of structured on-the-job, SME-guided learning activities. The course deliverables for each module included a trainee workbook, a facilitator guidebook, PowerPoint classroom presentations, and learning assessments.

In addition, there was a level 2 support group that received more complex support requests from the sales force, rather than communicating directly with customers in the call center. These issues often took one or two days to resolve, not the few minutes of a typical call center issue.



Solution:

What Clarity Did

From its database of 35,000 consultants, Clarity Consultants identified nine experienced Instructional Designers with financial industry knowledge. Although the consultants worked remotely, in the words of Finastra’s Training Manager “they were great at working with the SMEs” even in different time zones.

Clarity’s consultants worked with one another to develop a consistent look and feel for the training material. The consultants also delivered train-the-trainer programs when needed. The consultant working with the level 2 support group dealt with the group’s unique support requirements by developing a training activity in which the group members practiced creating the documentation needed by the customer.



Results: **The Outcomes**

Finastra was satisfied both with the quality of the training and that all materials were delivered on schedule under a tight deadline. In the words of the Training Manager, “we had the new hire program that we needed and the curriculum was ready when we needed it.” The Training Manager stated that Clarity’s consultants were “very good at using a consultative approach in working with the SMEs, and were good at understanding our design framework and in using our tools. All the consultants were really good at being both professional and persistent.”

The initial round of training has been a success. The trainers report that the curriculum is very well structured and that the guides provide the right level of detail. An indicator of the training effectiveness is that all the trainees have passed their assessments.



Breakouts: **Quotes**

Consultant quote: “This project was a win-win-win. The learners benefited from the training. I thoroughly enjoyed it and I know the customer was satisfied.”

Finastra training manager quote: “We had a very positive experience overall with Clarity and with the consultants, and in fact we’ve asked Clarity to provide consultants for a second training project.”



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.

[CONTACT CLARITY CONSULTANTS](#)

