

Clarity's Consultants Help New Bank Employees Learn Their Trade

Challenge

A FORTUNE® 500 financial services company merged with the wealth management division of another financial services company and needed to train its newest employees on the company's core trading system.

Opportunity

The trading system had 10 separate applications, each with a unique user interface and purpose. The wealth management division employees needed to perform their individual roles using these new applications. The target audience included employees who were extremely comfortable with trading systems as well as employees who were not familiar with such applications. Clarity provided a team of facilitators with financial services backgrounds and extensive experience conducting classroom training.

Results

The company held a series of train-the-trainer sessions to teach the Clarity facilitators the 10 applications. The sessions were staggered throughout the project to ensure that the facilitators' knowledge of the applications remained fresh.

The facilitators conducted instructor-led training sessions and supported learners in their offices as the new applications



were rolled out. The facilitators provided on-the-job assistance to help employees complete specific tasks and coordinated technical support when required.

► Do you have critical projects to complete, but lack the necessary resources to get the job done? [Contact us.](#)



Clarity enabled the company to:

- Get all of the division's employees trained on the system within six months.
- Provide technical support during the transition.
- Make the new employees feel welcome.