

Clarity Helps Global Bank Complete Merger

Challenge

A FORTUNE® 50 financial services company was facing a complex merger with new employees in the financial services and wealth management areas. In addition, an asset evaluation software application had undergone several upgrades and, because of the merger, many new employees had to be trained on the latest version.

Opportunity

The existing job aids for the software application had been developed using different word processing and presentation software applications, so they had different styles and formats. The client wanted the documents to be migrated to a common development tool. It also wanted a new eLearning module to support merger training and use of the software application.

Clarity provided a consultant with more than 15 years of technical writing experience, a strong understanding of financial service applications, and experience writing documentation for complex applications that could be easily understood by new users.

Results

After conferring with the client, the consultant elected to use PowerPoint® so that the work could be easily updated with application enhancements and could also be used as source material to develop the eLearning module.



The consultant reviewed the job aids, submitted a template for client approval, incorporated the preferred updates, and used PowerPoint to create new job aids. The common template and software application enabled the client to develop new job aids with a consistent format.

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



Clarity enabled the company to:

- Train a large number of employees on the new software application.
- Provide training content in an easily updateable format.