



# CASE STUDY

## Providing Hands-On Learning at a Large Bank Holding Company



### SITUATION

*A leader in the financial services industry needed to streamline their internal process for customer inquiries. The system that the company had in place required their employees to search various locations on their intranet to locate internal resources. This caused a lot of frustration for the employee and the customer due to the long period of time it could take to locate information.*

### The Challenge

To solve this, the company created the Employees Delivering a Great Experience (EDGE) knowledge management system, which has an enhanced search capability for internal content that provides a single point of contact. This system serves many business goals, but customer focus was front of mind when EDGE was developed. Knowing the customer makes it easier for the frontline banker/consultant to assist customers, which increases customer satisfaction rates. The company partnered with GP Strategies® when the first iteration of the EDGE knowledge management system was released. GP Strategies helped create a unique, blended learning experience for the holding company's employees, preparing them for the upcoming new system and providing them with the necessary knowledge to understand what the system is for and how to use it.

The goals of this program were to:

- Introduce the EDGE knowledge management system.
- Clarify when to use the EDGE system and when to use the company intranet to locate information.
- Demonstrate how to navigate to and locate content within the EDGE knowledge management system to assist customers with 100% accuracy.

Create a **UNIQUE**  
**LEARNER EXPERIENCE**  
to provide employees  
with the necessary  
knowledge to better  
assist customers



### GP Strategies Solution

The team discussed different ways to introduce this system and to provide a hands-on experience for learners to help them understand how the EDGE knowledge management system works and how it can benefit employees. The goal was to create something fun and unique to excite the learner about using the EDGE system and to allow learners to experience its enhanced search capabilities. By exploring the organization's priorities for learner outcomes and the learning experience itself, the team developed the idea for the scavenger hunt. The hunt, an interactive exploration of the EDGE knowledge management system, uses scenarios provided by subject matter experts who are encountering these situations day in and day out. This innovative, interactive approach motivates learners to use the system and think on their feet about real-world scenarios that they routinely encounter.

### Business Impact

The scavenger hunt provides learners context for using the EDGE knowledge management system to locate resources in realistic customer situations. This hands-on practice, in a safe environment, resulted in greater adoption of the platform than initially anticipated. Similar direct-practice experiences are currently being developed for the next phases of the EDGE sales and service platform. The organization is hopeful that comparable interactive experiences will result in early adoption and reduce the go-live anxiety associated with changing to a new and different platform.

#### Benefits to creating a hands-on scavenger hunt:



**INNOVATIVE INTERACTIVE APPROACH**  
motivates learners to use the system



**ABLE to LOCATE RESOURCES**  
in realistic customer situations



**Practice in SAFE ENVIRONMENT**

For more information about how  
**INTERACTIVE TRAINING EXPERIENCES**  
can benefit your employees, visit

 [www.gpstrategies.com/solution/managed-learning-services/](http://www.gpstrategies.com/solution/managed-learning-services/)

### About GP Strategies

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