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**CASE STUDY**

# A Dynamic Learning Transformation Re-Energizes and Modernizes Onboarding

# The Situation

Before 2020 and the pandemic, HSBC provided onboarding training in the typical way. What new employees learned, when they learned, and where they learned was dictated by office location and a set training program designed to lead learners through a series of common processes in preparation for taking their first calls. Everyone learned together, at the same pace, in the same way.

Even before the pandemic, first direct (fd)—a division of HSBC—the HSBC UK Learning team, and GP Strategies were already discussing ways to improve onboarding programs. fd understood that people learn in different ways and knew flexibility could help improve the organization. Just as they started thinking seriously about what they could change to make classroom-based, instructor-led training (ILT) even more effective, everything changed. HSBC and fd seized the opportunity to create a modernized, streamlined training experience for new fd employees.

HSBC knew that simply adapting fd's legacy ILT-heavy onboarding program to online video calls would not provide the flexibility they needed to meet the needs of their learners. They wanted to provide a way for individual learners to control the pace of their learning. HSBC also recognized that providing new employees flexibility and autonomy over their learning experience would result in higher engagement and a sense of empowerment, which would help the business meet its strategic goals.





# The Challenge

fd's legacy onboarding program was designed to equip the learner to handle customer calls on a variety of topics. The old learning journey jumped from topic to topic, making it difficult for learners to properly engage with the content at their own pace and forcing them to rely on the instructor's knowledge and delivery skills to fill in gaps. fd also knew they needed their onboarding program to showcase real-life scenarios and be more empathetic to the customer's journey.

fd's goal was to smooth out the learning journey, eliminate leaps in content, and to provide learners with what they needed to be successful in their role without getting overloaded with unnecessary training. Moving away from their traditional ILT-heavy program meant instructors and facilitators could then focus their attention where it was needed and support learners more effectively by providing one-on-one coaching.

To achieve these goals, fd needed to create learning assets that could be accessed at the point of need, whether this was during the onboarding program or for reference in the live business environment. The assets had to be easily consumable and accessible, and enable learners to learn independently and in groups. fd and HSBC engaged with GP Strategies to develop and bring to life the future of onboarding.

# GP Strategies<sup>®</sup> Solution

The objective of capturing the vital lessons from fd's traditional ILT program and translating those lessons into a self-paced learning environment required significant redesign. GP Strategies used their 7-step Crunch process to conduct an in-depth data driven discovery phase ensuring business needs and success measures align to performance. The teams then developed a streamlined, intuitive learning journey—called youfirst—which was designed to respond to the learners, the business, and ultimately customer needs.

**youfirst** is a four-phase journey with accompanying modalities to ensure learners receive relevant content when and where they need it. All the assets, including the learning journey itself, were designed to empower the learner rather than relying on facilitators to provide all the content. The goal was that learners would take more pride in and control of their learning journey, increasing their engagement in their role and in HSBC.

Every feature of youfirst was designed to be consumed by a hybrid workforce from any employee's location. youfirst training modalities include:

- **learning aids;**
- **on-demand videos;**
- **articles;**
- **knowledge assessments;**
- **case studies;**
- **micro-learning;**
- **an online community; and**
- **three necessary, targeted ILT sessions.**

The team chose Degreed as the delivery method to ensure the technology delivering the training had a wide range of capabilities and a user-friendly interface. The platform allows fd to create specific learning journeys, and pathways that access content from various sources and offers the opportunity to monitor how every learner is progressing. Facilitators also have a real-time view



# Business Impact

The results of youfirst have been very promising and have provided great benefits to the learners and the organization. We have seen:

**33%** increase in time saved by delivering learning in a better way

**76%** decrease in instructor-led modules

**317%** increase in time available for one-to-one coaching

**27%** decrease in attrition

**23%** increase in learner readiness

Learners themselves have provided positive feedback describing the benefits of youfirst:



I love the self-learn style followed up with coach support and knowledge assessments...I felt empowered and trusted."



I love that I got to communicate with a wider group of people, those that had been here for a while, people who had recently started, and those that joined at the same time as me!"

The instructors and coaches have been similarly enthusiastic:



I have nothing but positives to say about this. I was hesitant with us putting the ownership on the learner but having seen how this has landed and with the extra time I have been given to support each individual, its been brilliant!”



The mixture of different learning and delivery styles is great—there’s something for everyone, and as a bonus, you can re-visit them anytime you like on Degreed.”



For more information about equipping your employees with the tools they need for success, visit [www.gpstrategies.com](http://www.gpstrategies.com)



GP Strategies is a leading workforce transformation partner—one of the few truly dedicated global providers in the marketplace providing custom solutions. We believe our transformation focus, when paired with deep listening, a customer-centric approach, and innovative expertise, enables our clients to routinely achieve superior business and operational results from our evidence-driven and technology agnostic recommendations.

Whether your business success requires a change in employee performance and mindsets, learning technologies, or critical processes, GP Strategies is the transformation partner you can trust.

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