

Case study

Bespoke Training Programme

Company type

Well-known Australian bank

Industry

Banking



Situation

As a long established and reputable bank, the organisation was committed to giving its shareholders and customers world class service. To maintain its position, its staff needed to remain engaged and well trained. This included the Finance team, who needed to maintain a strong working knowledge of all the bank's products and services, whilst continually being upskilled in various reporting and analytical tools to deliver real-time reports accurately and promptly.

Complication

The business identified productivity and efficiency opportunities within the Finance team, utilising existing tools e.g. Microsoft Office 365 to eliminate and reduce manual work through identifying and implementing strategic and tactical automation.

We helped identify, develop and train on such processes and also, with the assistance of an accounting institution, helped promote a 'pull transformation culture', whereby colleagues actively sought out transformation opportunities using Excel, Power BI and Power Automate tools.

Indeed, this required SumProduct working with the bank to quantify and communicate productivity improvements from a cohort of selected 'Digital Accelerators' working on real-life business cases, who would then act as proactive catalysts for change across their teams and function.

Resolution

The program of learning was structured in multiple phases to maximise tailored and individual learner buy-in, relevance and contextualisation of content in order to meet program objectives.

This was achieved through one-to-one consultations, regular two-hour training sessions over a three-week period and *ad hoc* follow-up meetings to ensure learnings were put into practice back in the workplace. Quarterly sessions were then held to showcase various achievements, emphasise key learning points and update on new technologies as they arose.

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Resolution (Cont'd)

Further cohorts have since been put through this programme with all attendees fully dedicated to continuing on-the-job training and promoting the continued commitment to change. Further, SumProduct continues to check in with various attendees to ensure resolution of any queries or problems as they arise. This is a continuous improvement initiative.

Program outcomes

- Immediate return on investment as the program solved real business problems that led to immediate improvement in productivity and efficiency gains, which could then be promoted and propagated through other similar tasks and reports
- Time savings estimated to be in excess of 1,000 hours per person, per annum – a truly incredible number
- Survey results clearly demonstrated a greater, more positive understanding of, and confidence in, the existing toolsets. This benefitted the trained staff, their colleagues and the leadership teams.