

CASE STUDY: CLIENT EDUCATION FOR ASSET MANAGERS

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Overview

Our client is a large asset manager with almost one thousand investment professionals located across the world's major financial centers. The client had a need not only to train a large group of internal employees in multiple regional offices, but also to roll-out client education services to a range of external partners and organisations. Usage of eLearning content among internal and external partners had historically been low in comparison to similar organisations.

Problem

The client needed to encourage internal stakeholders to buy-in to the concept of eLearning, and drive usage accordingly. The marketing team wanted to explore the benefits of client education as a value-adding service for external partners.

Elements of Solution

- Know-How Mapping
- Advisory Services
- Technology

Our solution

Intuition reviewed the current offering and proposed the mapping and alignment of our proprietary Know-How financial services library to specific roles and departments. Our learning services consultants, who have specific domain expertise, mapped our content against their chosen division of the organisation and staff.

The initial mapping focused on Early Careers Development and the grouping of Introductory-level, Intermediate-level and Advanced-level content for different Trading Desks. This was then refined in collaboration with the client, to ensure they were only subscribing to the content they needed and maximizing the value they receive. Intuition then segmented the learning paths into streams and created robust examinations to replicate exam conditions.

The client had their own LMS and Intuition provided an integration utilizing the AICC protocol. This allows us to host our eLearning content and keep it up to date with our frequent updates and releases.

For the client education element, the marketing team wanted a simple, scalable solution that they could roll out to external partners & prospects. This solution had to be easily managed by the client's marketing team, all usage on the platform was to be tracked, and they wanted to have their own "look & feel".

Using Intuition's NX platform, the client chose 10 key titles from our Know-How library to offer to these external partners. The initial take-up has been so positive that plans are in place to expand the offering to additional languages (French, Italian, and Chinese) and titles.



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Outcome

The usage and feedback across the organisation has been very positive, with over 100,000 hours of recorded study time for internal users. There are currently 790 users globally and they have launched approx. 10,000 modules since the re-launch in January 2019, with a completion rate in excess of 85%.

The marketing team have seen improvements across a number of key metrics:

- Engagement with external partners, organisations, IFAs increased by more than 50%
- Conversion of prospects has become much more efficient, with time to close a deal down by a quarter
- Increase in the number of inbound leads generated from client education sign-up sheet



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Know-How