


MEETING CONVERSION TRAINING NEEDS OF NATIONAL BANK



CHALLENGE This large national bank with thousands of branches across 21 states acquired a large regional bank and its over 500 branch locations. The bank needed to convert all of its newly acquired branches and operations centers to its technology system without disrupting business. The bank had encountered many problems with a previous conversion and had lost customers as a result. They were anxious to avoid any mishaps with the acquisition and to keep customer attrition to a minimum.

SOLUTION

- Analyzed systems and processes of both banks to develop a customer-specific resource solution matrix.
- Sourced a large pool of qualified trainers with deep banking and organizational change experience to deliver conversion training.
- Screened and vetted all candidates to create list of qualified finalists.
- Conducted pre-interview client orientation to culturally align candidates prior to submitting them to bank for consideration.
- Placed 75 percent of trainers needed for the conversion project.

Return on Investment

- Conversion was successfully completed with minimal disruption.
- Client attrition was lower than anticipated for a typical conversion.
- Participant's post-training evaluation scores exceeded bank's expectations.
- Contracted trainers went on to fulfill training duties for other projects at a fraction of the cost for full-time employees.