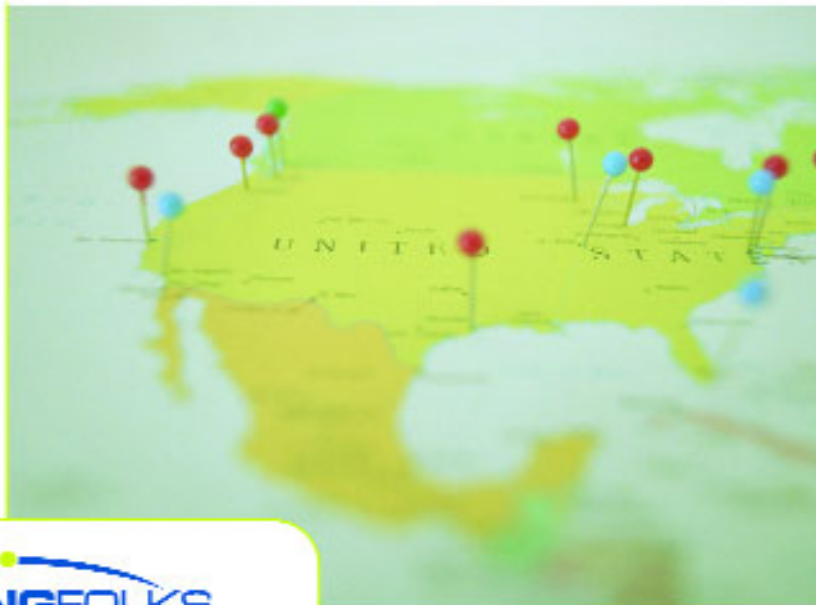




"TrainingFolks brought their knowledge, experience and understanding of our business and the project to help us rollout successfully."

- Laurie Miller

*Project and Relationship Manager -
RBC Investments Training*



Case Study - RBC



Investment Banking

RBC Investments, the wealth management division of RBC, manages \$464 billion in assets, and serves 10 million individual and business customers worldwide.

To better service their clients and Investment Advisors, RBC Investments planned to upgrade from their unrelated portfolio and CRM systems, to the ClientLink Portfolio/CRM application. It needed to be installed, existing data migrated and people to be trained effectively to allow minimum exposure to daily business activities.

Training and Development was tasked with delivering a strategy integrated with the existing sales and service process. The learning had to be hands-on, with experienced technology facilitators training Investment Advisors, Branch Managers and support staff.

Learner Audiences

3 200 Investment Advisors, Branch Managers and Admin Staff

Delivery Location

180 locations Canada-wide

Content Focus

ClientLink application

Lead Time to Mobilize

4 months

Train the Trainer

5 Days

Challenge

Provide a 9 day integrated technology/training rollout to 3 500 Investment Advisors, and their support staff in a eleven month window. Co-ordinate the installation, migration and training of the ClientLink CRM application.

Solution

TrainingFolks began by assessing the requirements of the project and co-operatively selecting appropriate consultants with RBC Learning Services. Finding technology facilitators, experienced in investment banking and regionally located was simplified by the TF Network.

The Just-in-Time Training - Technology Delivery Solution provided RBC with a facilitation team, who were qualified, experienced and just-in-time to deliver the 9-day program across Canada. TrainingFolks helped to manage, administer and schedule 18 facilitators and were able to adapt to the changing needs of the project and the schedule.

Results

- Reduced the rollout schedule from 11 to 8 months
- Provided a variable cost model which minimized the impact of scheduling changes.
- 75% utilization of the new system months after completion of training

Residual Benefits

- the facilitation team identified, communicated and managed software issues relating to the rollout.
- front-line support by the facilitation team provided instant feedback.
- identified, developed and delivered ClientLink help-desk training based on feedback from team.