

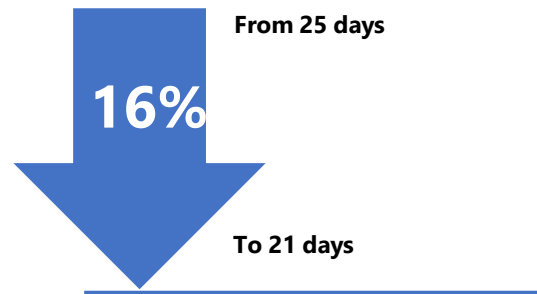


Client Story #1

Onboarding - Call Center Learning Transformation

Global Financial Services

Time to Proficiency



Challenge

A global financial services company wanted to improve the customer service experience and the workforce's ability to delight their customers. The Retail Services function was seeking an upgraded new hire training experience to reduce customer wait time, time on the phone, and resolution close time.

Solution

PDG partnered with the company to analyze the current state of the new hire curriculum and to build an Onboarding Solution to drive the business goal of improving the customer experience.

The new Onboarding Solution was a 4-week interactive blended learning journey for new hires built on **PDG's Know-Do-Refine Solution Framework** and consisted of:

- Providing targeted knowledge through formal e-learning, microlearning, and shadowing advisors on the floor as well as informal learning through games
- Advancing customer service skills through simulations (hands-on scenarios, recorded calls, etc.) and taking live calls in the Development Center
- Applying and reinforcing key concepts learned through assessments, mystery calls, and role plays.
- Accelerating a new team member's time to competency with tools and performance support job aids such as graphic novels, quick cards, and infographics that can be pulled through to on-the-job
- Emphasizing skill development as a continuous experience allowing new hires to refresh knowledge and close skill gaps while receiving integrated Manager coaching and mentoring

Client Story #1 (Continued)

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Formal Learning Samples

As part of the blended learning strategy **e-learning** and **micro-learnings** were utilized for targeted knowledge with application and reinforcement of key concepts through **assessments** and **simulations**

Authentication Overview

START →

KNOWLEDGE CHECK 1

Match the question with the type of authentication.

Drag and Drop each Question to the correct Authentication Type, and then click Submit.

Authentication Type

Personal	Transactional
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- What is the month and year of the account deposit opening?
- What is the amount of your last deposit?
- What is your exact date of birth?
- Where was your last debit card purchase made?
- What is the 3-digit CVV security code on the back of your card?
- What are the last four digits of Social Security Number?

BACK SUBMIT

Page 9 of 21

STEPS 9 – 10 (SHOW ME) “Review My Transaction History”

Security Management Details

> Customer Details:

Date of Birth: 09/13/1961 Check Answer

Last Four Digits of SSN: 9586 Check Answer

> Credit / Debit Cards:

Select Card: 5555 6789 1000 7777 Check Answer

CVV2 Code: 1947 Validate Check Answer

Last Twenty Transactions: [View details](#) Check Answer

> CD's/IRA's:

Select CD/IRA: Step 9

Amount of Original: Ask an additional Personal Question.

Terms: • You may ask, "What are the last four digits of your Social Security Number?"

> Loans/Mortgages:

BACK Page 9 of 26 NEXT

CAN YOU SPOT THE RED FLAG?

Hi. How can I help you today?

Yeah, how are you doing?

I'm fine, how are you?

I'm doing good. I was speaking with one of your friends there and trying to find out if I could set-up my telephone or internet banking but I couldn't hear them. So, I want to set up my telephone/internet banking, what can I do?

BACK Page 9 of 11 NEXT

Client Story #1 (Continued)

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Performance Support Samples

As part of the blended learning strategy, **graphic novels** were used as an innovative approach to feature the correct behaviors on how to interact with stakeholders and customers, as well as problem solve and make decisions.

This example brings to life how a customer service representative handles a customer objection regarding overdraft fees. **Click the image** to see this sample.

Additional tools and job aids such as quick cards and infographics were also created to accelerate time to proficiency and to be pulled through for on-the-job performance support.



Client Story #1 (Continued)

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Informal Learning Samples

As part of the blended learning strategy informal learning was provided in the form of games to increase knowledge, application, and reinforcement of key concepts learned.

