



## Situation

In order to create efficiencies and reduce expenses, our Client, a multinational financial services corporation, kicked off a corporate wide finance project the preceding year, to identify, streamline and automate areas of the financial planning process and to establish a center of excellence. The Client requested an experienced Instructional Learning and Development professional to act as a Training Lead in support of the Investment Management workstream within the broader Global Finance project to conduct training and plan, develop, and deliver employee training materials.

## Solution

The Learning Lead was responsible for supporting and coordinating the planning for the training across different geographies, development of training materials, and delivery of employee training and training materials for the Investment Management workstream. They were also responsible for the existing training project plan, providing regular updates and elevation of any risks.

## Results

Quickly upon joining the work stream, the consultant met with key team members to review the scope of work, gaining alignment on deliverables and timeframes. This required working with key Finance personnel in India and New York. The SolomonEdwards Learning Lead provided the following support:

- Updated and maintained the training project plan, secured updates from task owners, identified risks and elevated issues, as appropriate;
- Provided weekly updates and worked closely with key subject matter experts to develop core training materials to train resources who would be using the new processes and tools;
- Developed training materials for use in live training forums and through WebEx.
- Scheduled training for employee's across different geographies and time zones and coordinated subject matter experts to help deliver the training content.
- In total, the Learning Lead's efforts served to train over 250 employees across the globe over the course of two weeks.



**INDUSTRY:**  
Banking



**DEPLOYMENT:**  
Individual



**SERVICES:**  
Business Transformation

*Organizational Effectiveness*

*Change Management, Readiness & Adoption*