



CASE STUDY: DEVELOPING TRAINING GUIDE

The Challenge

BTI's client administers deferred compensation plans within a 60,000 employee global bank. The group manages a portfolio of complex plans which may be modified on an annual basis and must comply with regulations in 50 jurisdictions. Staff must be highly educated in deferred compensation, the bank's plans, its regulatory environments and the group's systems. In response to an audit, the client requested that BTI develop training guides.

BTI's Approach: Rapid Documentation

The client's environment was extremely complex and dynamic. BTI's solution needed to include structures for simplifying the training process; and address the issue of maintaining the training guides. BTI's consultants used Rapid Documentation to develop a standard deferred compensation plan process map. This process map included processes for developing or modifying plans, implementing the plan and running the plan.

Once the standard map was developed it was then modified for each of the plans to accommodate the differences. The individual process maps were used as organizers for the training guides. Once staff had a picture of the common processes, it became easier for them to visualize the differences between the plans and facilitated training.

BTI's consultants were then able to create the training guides. Since many processes were similar across plans, the development and maintenance of the training guides was streamlined.

To ensure that training guides were readily available to staff located in several global locations, the training guides were published on the firm's intranet via FirmCover®, a web based application for distributing and maintaining documentation. FirmCover® ensured that reliable procedural information was accessible to staff.

Sustainable Benefits

BTI's Rapid Documentation and FirmCover® have provided the client with an effective infrastructure for accelerating staff training and improving their processes and controls. As a result of the success of BTI's project, several more projects were undertaken to improve systems and streamline processes. The client now has a model for developing and implementing new plans and continues to utilize Rapid Documentation and FirmCover® for managing training guides.