Delivering a Successful Training and User Adoption Project for a Global Bank

TECHARY

BRIEF

Techary were engaged to provide a large international investment bank with a phased user adoption programme to support the upgrade and migration of approximately 600 trading positions over a 4-month period. Techary worked closely with the client's project and technical teams to deliver a successful user adoption programme, giving uninterrupted floor support for each of the 6 phases of migration.

A point to note is that this technology upgrade was largely carried out in the midst of the global pandemic, and with the challenging enforced restraints and restrictions, the Techary team continued to successfully deliver its services both remotely and on client premises, complying with strict PPE processes.

SOLUTION

FOCUS GROUPS

Initial workshop/focus group sessions were set up in advance of the training days to assist with device evaluation, to help advise on the type of device to deploy. Focus groups were delivered centrally on a busy trading floor with clear marketing/signage to encourage users to stop by for Q&A and 'sample' the new devices being deployed. This helped drive essential feedback.

TRAINING

Typically, a training session included a demonstration of functionality of one of the 3 different devices being deployed. Dependent on the type of business group, relevant programming functions & features specific to that group were identified and demonstrated thoroughly.

Bespoke 1 hour training sessions were provided along with User Acceptance Testing (UAT) which was tagged on to the end of the session. The lead training consultant liaised closely with the client's project and technical teams to report on all issues present at training as well as any profile change requests for timely resolution in advance of data migration.

CO-ORDINATION

Although not an initial client requirement, the role of a training co-ordinator was quickly identified midway through the first phase as key to the success of the project, to drive user interest and attendance. This role was adopted by the lead consultant, who worked very closely with all key stakeholders including desk heads/ business managers and the trader voice project teams to build and grow good relationships. Spreadsheets were designed and built to manage, schedule, track and report on each of the migration phases.

GO LIVE ✓

A full trading floor support team delivered a visible and uninterrupted floor walking response for onsite user assistance, providing effective fault logging for timely resolution. The lead consultant was on site to assist at all times and oversee and direct the team, thus helping to ensure that all elements of the migration made for a smooth transition with minimum disruption to the trading day. Soft guides were distributed to users for ongoing assistance and reference to functionality and features of the new device.

RESULT

- Dedicated co-ordination of training sessions ensured a high percentage of users were trained - deemed by the client as a vital element of the migration's success

- Structured training sessions in a relaxed environment without distraction was essential to help users embrace their new technology in a positive way

- Continuity of lead consultant and additional training team throughout migration project instilled client and user confidence

- UAT within training ensured user profiles were correct and traders could be fully productive on day 1 of migration, helping to ensure a seamless transition to the new upgraded platform

600
users

Support   Projects   Procurement   Resources

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