

FINANCIAL SERVICES IN A BUSINESS AS UNUSUAL WORLD

Looking Ahead

March 2021



INTRODUCTION TO YOUR DEDICATED TEAM

Working with you side by side, everyday



DANIEL MILLER

Senior Vice President
Global Financial Services



 Your **trusted** workforce transformation partner



2021 TOP INDUSTRY TRENDS

Applying Modern Learning to Faculty
Communities

A Culture of Accessibility

Diversity & Inclusion

Learning in the Flow of Work

Case in Point: The Credit & Risk Learner
Experience

Extended Reality – The “Discovery” Sandbox

Future Skills

AGENDA

TRANSFORM WITH US

A NEW YEAR

••• Financial Services & Learning

Developing our People Capability

HOW ARE WE GOING TO GET THERE?

2021

THE FACULTY COMMUNITY

- The Shift to VILT has driven new approaches to resourcing and developing faculty. Partner Relationships create **global reach**.



**TOP
INDUSTRY
TREND**

CREATING POWERFUL FACULTY COMMUNITIES

To be truly effective in a virtual classroom, course content must be skilfully designed specifically for the environment.

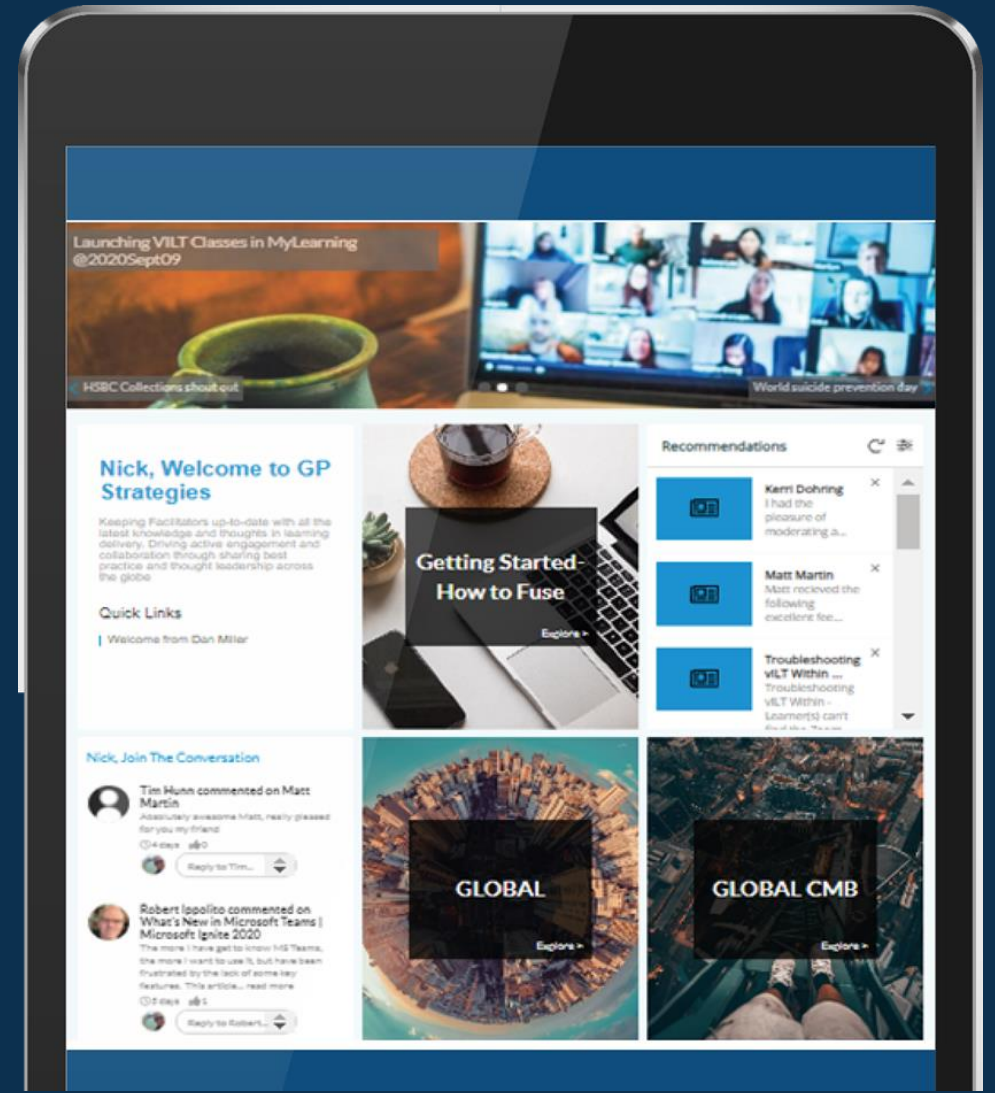
Facilitating in a virtual classroom requires a specific skillset to engage and involve the audience.



For learners to get the most out of the LOL experience, they will be mentally prepared, situated in a distraction free environment and be logged on in good time.

Virtual classroom facilities range from simple home studios to highly interactive environments or hybrid classrooms.

Virtual classroom learning: Elements for success



A CULTURE OF ACCESSIBILITY

- Part of the larger inclusion conversation, but no less important. L&D puts learning in *everyone's reach*.



**TOP
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TREND**

FINER POINTS

- Accessibility as a design point, across the learning journey
 - New employee onboarding
 - Employee community
- Commitment demonstrated through accessibility-specific training and accommodation
- Strategic innovation and research



TRANSFORMATIONAL DIVERSITY AND INCLUSION

- Responding to challenging conversations with **increasing levels** of **complexity**.

**TOP
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TREND**



FINER POINTS

- Culture Strategy
- New mindsets and new skillsets
- Shifting the way we provide access to learning opportunities (time and timing)
- Mentoring Reimagined



LEARNING IN THE FLOW OF WORK

- The technology and data informing, supporting and shaping the flow of work. **Adapting learning to meet people needs in a new workplace.**

A photograph of a meeting around a wooden table. In the foreground, a laptop displays various charts and graphs. A person's hand is visible near the laptop. To the right, a person is holding a pen over a document. A coffee cup is on the table. The background shows other people in a meeting setting.

**TOP
INDUSTRY
TREND**

FACE THE FUTURE

FOCUS on the learners/employees, design with an inclusive mindset.

ALIGN with the business: identify critical skills to enable your business recovery model. Accelerate adoption of learning technology and analytics.

CREATE a learner experience playback. Continue to innovate – explore, test, evolve, scale.

EXECUTE with an Agile mindset – start quicker and smaller, scale successes, collect data to inform evolution. Evolve your learning ecosystems.



AN INVESTMENT IN INNOVATION

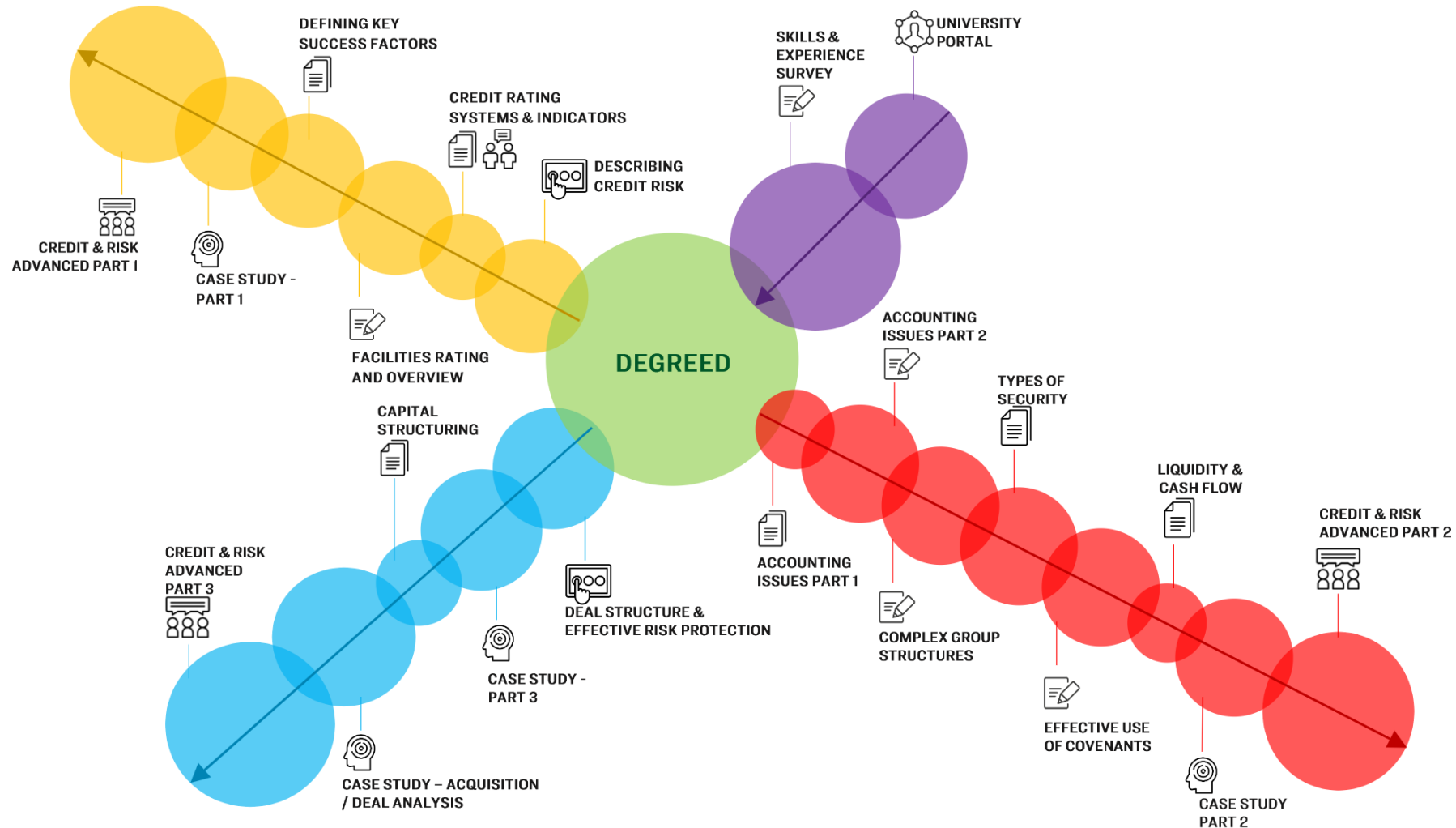
- **Revolutionary vs. Evolutionary:**
Moving forward, sustainably, strategically,
and systemically.



**TOP
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TREND**

FACE THE FUTURE – ADVANCED CREDIT & RISK CASE

●●● High Level Learner Experience



PATHWAYS KEY:

-  eLEARNING
-  ACTIVITY
-  PERFORMANCE SUPPORT
-  PODCAST/VODCAST
-  CASE STUDY
-  LIVE ONLINE

CREDIT & RISK ADVANCED

● ● ● Learning Pathway



DEAL STRUCTURE & EFFECTIVE RISK PROTECTION

eLearning –
30 mins



CASE STUDY – PART 3

Pre-VILT Activity –
30 mins



CAPITAL STRUCTURING

Performance Support



CASE STUDY – ACQUISITION/ DEAL ANALYSIS

Pre-Live Online Activity –
60 mins



CREDIT & RISK ADVANCED PART

Masterclass Live Online –
180 mins

Module focusing on:

- Financial and Non-financial Covenants
- Incurrence & Maintenance Covenants
- Problem Areas
- Components of a Financial Forecast
- Forecasting – Key Questions
- Hedging Risks
- Derivatives – Warning Signs

ADD ON – deeper dive by way of a VOD/Podcast recording and presentation

Learners are provided with reference materials for Comms Co or Tools Co and are asked to review the request for new monies/increased funding, together with the main terms and conditions to establish if they would wish to assist or not. The learner will bring this pre-VILT work to the VILT session (3) which will include:

- A group activity to pool collective thoughts and considerations
- Create a group overview/ presentation
- Share and discuss if full group de-brief to allow key learning points to be drawn out and shared

A robust and visually impactful learning companion that learners can refer to as a specific knowledge aid, covering:

- Bilateral Loan
- Syndicated Loans
- Private Placement
- Investment Grade Bonds
- High Yield Bonds

Learners are provided with reference materials for BIG & Target Co and are asked to review the acquisition and deal from a credit forum perspective. The learner will bring this pre-VILT work to the VILT session (3) which will include:

- A group activity to pool collective thoughts and considerations
- Create a group overview/ presentation
- Share and discuss if full group de-brief to allow key learning points to be drawn out and shared

Engaging, interactive masterclass in which learners will be able to build upon what they have learned so far.

Hosted by a Facilitator, there is an initial recap on key learning points in the pathway with focus on the continuing Case Study Comms Co or Tools Co to review and de-brief.

There is a Debt Instrument group activity and a final case study to analyze a real scenario deal proposal, providing key thoughts and considerations from group work and collaboration.

Learners have the opportunity to hear from a Credit & Risk expert from the CMB business to get a view on current market and industry challenges and closer CARM quality issues and how to resolve more effectively.

FINER POINTS

- Learning at the point of collaboration
- More available workflow data
- Learner centricity magnification
- AI, automation and performance enablement



EXPANDING ON & REFINING EXTENDED REALITY (XR)

- The tech is here. Now it's time to **refine** and **expand upon it**.



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FINER POINTS

- Blending Augmented and Virtual Realities
- Enabling Hybrid Learning Experiences: Virtual and face-to-face
- GP "Discovery" sandbox – onboarding new employees

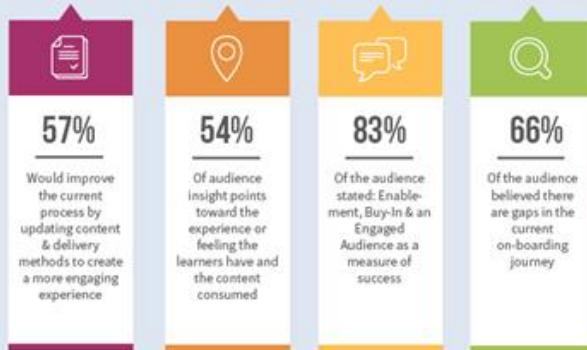
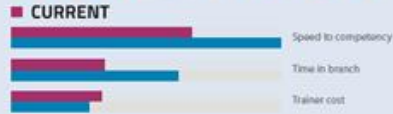




2021 ONBOARDING JOURNEY

The time is now.
CASE STUDY IN ACTION

CURRENT STATE



"THE DELEGATES LEARN WHAT THEY NEED TO SURVIVE, THE SYSTEM, PRODUCTS, HOW TO COMMUNICATE WITH CUSTOMERS & HOW TO DEAL WITH COMPLAINTS."



Attrition, speed to competency, costs, performance & employee engagement
Pain points captured from data insight

"A LEARNER CANNOT REMEMBER EVERYTHING THEY HAVE BEEN TAUGHT BEFORE DOING THEIR JOB. AS TRAINERS, WE DON'T HAVE ENOUGH TIME TO DO WHAT WE WANT."

JOURNEY

Pre-boarding

A visceral experience that starts with pre-boarding
We create an impactful Day 0 experience to build on existing momentum as designed around six key nano experiences

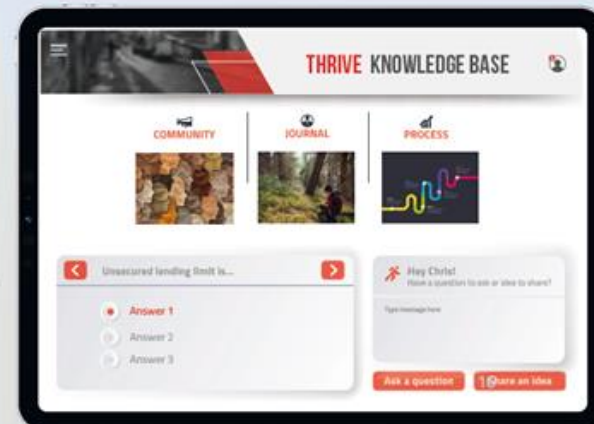


Learning, growth & development in the flow of work. THRIVE.

The personalised on-boarding experience that is tailored to the learners pace & aligned to customer and bank aspirations.

A scalable approach to training content and business drivers adapting to branch, economic or legislative conditions.

FUTURE STATE



FUTURE SKILLS

- Empathy. Growth. Resilience. Learning agility. These are the **mindsets** that **enable a workforce to change and evolve.**

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FINER POINTS

- Focusing on mindsets and knowledge, skills and abilities
- The right openness, empathy and emotional intelligence enable organizational change



FINER POINTS

- Aligning to an increasingly VUCA world
- Shifting from traditional to agile change approaches
- Supporting employees as we all weather storms



REFLECTIONS



“THE FUTURE IS COMPLETELY OPEN,
AND WE ARE WRITING IT
MOMENT TO MOMENT.”

— PEMA CHÖDRON

LET'S WORK TOGETHER

Q&A





CONTACT US

Dan Miller

Senior Vice President

dmiller@gpstrategies.com

LinkedIn: <https://www.linkedin.com/in/dan-miller-403a342/>