



Case Study

Instructional Design

Client's Business Need

Change the global finance associate role from “number cruncher” acting in a support role to a strong business partner who collaborates to meet business objectives and financial goals, manages financial planning continuously and consistently, and drives business decisions and their financial outcomes. In addition, enhance cross-job learning to increase workplace effectiveness and decrease the learning curve for finance associates moving between jobs. To support this shift, our client asked us to develop a finance curriculum.

Our Learning Solution

EnVision developed three courses per year on wide-ranging financial subjects including financial planning, asset management, earnings variation analysis, and trade investments. We worked closely with the client's content experts from around the world to develop course content and prepared those experts to deliver courses.

Our solution included the following services and deliverables:

- Needs assessment, resulting in a design document that served as a basis for course development. Our design included a blended approach of self-paced, independent pre-class preparation and highly interactive workshops.
- Development of detailed instructor guides, self-paced “lightly interactive” PowerPoint presentations for pre-work, participant guides, slide shows, and activities for action-based learning for six courses.

- Course evaluation forms to aid the program manager in monitoring learner reactions to the courses.
- Train-the-trainer sessions for all course instructors during which we provided coaching to ensure effective course delivery.
- Pilot course management, including a pilot debrief session and course enhancements.

Improved Employee Performance

The client was pleased to have, for the first time, a functional curriculum to support the finance function globally. All six courses were implemented within the client's timeframe and:

- Over 500 finance associates were trained globally within the first two years.
- The curriculum helped position the company for effective integration with its new owner.

Your Business Needs. Our Learning Solutions. Improved Employee Performance.™