Developing an E-learning Solution for CFA Institute

QUICK FACTS

Objectives
• Train CFA’s global workforce on how to use the new human resource information system
• Develop an e-learning solution on Workday’s performance management and compensation modules
• Complete development prior to CFA’s year-end performance review exercise

Challenges
• Understand CFA’s employee-centric culture and ensure training aligns with its values
• Identify what key client stakeholders want included in content
• Accommodate the software’s new updates which impact delivery timeline for final module

Implementation Highlights
• Incorporated scenario-based simulations using interactions between on-screen characters
• Adapted to an Agile-like approach to complete the final module in just four weeks
• Utilized the ADDIE model to develop custom curriculum

Technologies Supported
• Articulate Storyline
• Workday®

Results
• Developed 12 e-learning modules
• Received positive response from workforce
• Enabled quick user adoption of new workforce management tool

Client Profile
Industry: Financial Services
Revenue: $220 million
Employees: Over 500
Geographic Presence: Global headquarters in Charlottesville, Va. with regional offices in New York, London, Brussels and Hong Kong
EXECUTIVE SUMMARY

CFA Institute partnered with TEKsystems to develop an e-learning solution to train its global workforce on its new human resources information system.

“TEKsystems’ team exceeded our expectations in their client service and technical skill. They were able to translate our conceptual ideas into engaging, professionally designed training materials. Trisha treated the projects as if they were her own, reviewing and tweaking the materials for consistency and accuracy. We would highly recommend TEKsystems for future partnerships with CFA Institute.”

– Head of Global Organizational Development and Learning

Client Profile

Founded in 1947, CFA Institute has grown to become the largest global association of investment professionals with more than 120,000 members in more than 140 countries. CFA’s mission is to lead the investment profession globally by promoting the highest standards of ethics, education and professional excellence for the ultimate benefit of society. TEKsystems has partnered with CFA Institute since 2012.

Project Overview

Organizations turn to technology to increase efficiencies, enhance communication and improve their business’ bottom line. When introducing a new technology into the workplace to improve internal processes, companies have to be prepared with a customized training program that will minimize disruption, eliminate questions and ensure adoption.

Many technology companies offer educational materials for their software; yet, the materials may not be aligned to the customizations in the software particular to that client—each organization having their own unique terminology, structure, processes and culture. Partnering with an external IT training and education partner can help bridge the gap between the technical aspect of a technology and connecting it to how an organization’s users will apply it to their day-to-day work.

IT education partners with both technical and training experience can help organizations design, develop, implement and deliver a custom training solution that uses real-world examples and scenarios that resonate with the audience. Additionally, a training partner can collaborate with an organization to identify its end goals and then help ensure that the content and post-training assessments align with these goals, ensuring comprehension, user satisfaction and ultimately, adoption of the technology.

Situation

CFA Institute was implementing a new human resources information system (HRIS) platform that would impact its more than 500 users worldwide. CFA would be implementing the performance management and compensation modules off of the Workday platform. As with any ERP-type solution, the platform would be customized to CFA’s internal processes and procedures.
CFA felt it was critical to provide in-depth training around compensation and performance management—whereas some organizations may not invest in training around these topics. But CFA’s culture and values—including “teamwork and a collaborative and inclusive environment”—called for it. CFA wanted to be very clear, open and transparent with their employees around these topics. Its employee-centric culture called for a customized training approach.

Due to the disparate locations of their users, regional offices in the U.S., the U.K., Belgium and Hong Kong and remote employees across the globe, the client sought an e-learning solution that its entire workforce could access. The client also faced an aggressive timeframe. In order for the software to be used during the upcoming performance review process, the course would need to be developed within eight weeks. Success was defined as delivering an effective training solution in time that would also ensure user satisfaction and adoption, and maximize the organization’s investment in the new platform.

**Solution**

Based on the processes and functionalities of the Workday tool, and its interaction with the performance management and compensation functions of CFA’s business, we would develop over 130 minutes of e-learning content. The content would be delivered through 12 e-learning modules, short “how-to” modules that would allow managers and employees to learn the tool’s functionality efficiently.

TEKsystems would use the training industry best practice model, ADDIE (Analyze, Design, Develop, Implement, and Evaluate) for development and delivery of our offerings. The following is our general development approach:

1. **Requirements gathering.** We would partner with key CFA stakeholders on the performance management and compensation teams to identify requirements to effectively design a course that met their needs. Through this phase, we would create a curriculum/program framework and recommendations for the training program.

2. **Design.** TEKsystems’ instructional designers would collaborate with CFA stakeholders to develop the design document for the course. Also, content gathering would begin (i.e., screen shots, process documentation, etc.) and continue into development.

3. **Storyboard/prototype development.** Following CFA approval of the design document, the instructional designers would continue developing the necessary content to be infused into the storyboards for each module. A prototype of approximately three to five screens would be provided to CFA to approve visual concepts.

4. **E-learning development.** Instructional designers and a graphic designer would develop the final e-learning solution using the approved storyboard. Graphics, animation, text and audio would be developed and synced in the e-learning authoring tool Articulate Storyline.

5. **E-learning implementation.** During implementation, we would deliver the final e-learning course files via an FTP site. CFA would then upload and test courses on their SharePoint site.

6. **Review and sign off.** At the successful completion of the above deliverables, CFA would sign off on the project.

At the end of each phase, CFA stakeholders would have the opportunity to provide feedback and review deliverables and approve prior to TEKsystems moving on to the next phase.

Our team of a graphic designer, quality analyst, voiceover specialist, two instructional designers and a training project manager would collaborate
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on delivering this solution. A particular feature we would include provided demonstrations and simulations of the tool to provide real-life examples of how to use the tool. Scenario-based activities—interactions between two on-screen characters talking to each other and posing questions, with the characters’ expressions changing based on the answers—can greatly improve comprehension for users.

CFA would launch the e-learning modules on their SharePoint site. Since CFA did not have a learning management system (LMS), they needed a mechanism to track the training. We would accomplish this by adding a button at the end of the course that populated an email for the student to send to human resources (HR) to indicate their completion of the course. HR would then log each student’s completion in a database.

Results

TEKsystems was working with CFA’s CIO on another initiative when the organization began to undergo its Workday implementation. CFA decided to partner with us based on a recommendation from the CIO to its head of global learning, as well as our vision for the e-learning solution.

TEKsystems’ instructional designers and project manager expedited kick off with an on-site meeting at CFA’s global headquarters in Charlottesville, Va. to spend time getting to know the client and laying the foundation for the partnership. During this meeting we identified what the courses were going to look like from a high level, as well as the subject matter experts needed to prepare detailed content and sign off on the course. We were able to fully understand the complex nature of the CFA culture because we immersed ourselves in it.

We completed 12 e-learning modules (135 minutes of training) for CFA in time for their end-of-year review process. As with most software, Workday updates its product periodically throughout the year. Waiting on one of these updates, the development of one of our final sessions was put on hold. To make the client’s desired deployment timeline, we decided to change our development approach for the last module from Waterfall to Agile methodology to meet the aggressive timeline of four weeks, just half the time as the other modules. Our approach included daily huddles to obtain and implement client feedback in real time.

The solution also aligned with CFA’s core values and assisted in driving the company culture that is very important to its leadership, in particular, its value of “teamwork and a collaborative and inclusive environment.” This engagement exemplified CFA’s commitment to this value as it focused heavily on increasing clarity around how performance management and compensation would be conducted and evaluated. The e-learning modules helped CFA’s users learn how to use the Workday tool, better understand their compensation structures and performance review processes, and feel confident in utilizing the tool for performance management and compensation functions.

TEKsystems will continue to support CFA during future releases of the Workday solution, helping to adjust the training to reflect new changes in the software. We have also been engaged to support two additional training and education projects, an e-learning session on a talent acquisition module, and a blended solution for the launch of an updated CRM system, combining on-site, instructor-led training at multiple sites globally, e-learning for remote offices and user guides.

Key Success Factors

- Cultural alignment. The client’s business objectives were to ensure that their employees—their end users—were comfortable with and would utilize the tools. Since we had worked with CFA on previous staffing engagements, we could more easily integrate our knowledge of their employee culture into the final product. Plus, the kick-off meeting at the client site was unique for an e-learning solution and allowed for team building and establishing a rapport.
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• **Flexibility and communication.** We were responsive to requests and able to change our approach for the final module to meet the tight deadline. Throughout the process we would provide status updates to keep key CFA stakeholders aware of our progress. During development of the final module, when we switched to a more Agile-like approach, we ramped up the communication to daily huddles in order to obtain client feedback in real time.

• **Project management.** This engagement was very timeline-driven. We devoted a high level of skill and attention to the project management process to attain the desired outcomes on time, which we did successfully.

ABOUT TEKSYSTEMS®

People are at the heart of every successful business initiative. At TEKsystems, we understand people. Every year we deploy over 80,000 IT professionals at 6,000 client sites across North America, Europe and Asia. Our deep insights into IT human capital management enable us to help our clients achieve their business goals—while optimizing their IT workforce strategies. We provide IT staffing solutions, IT talent management expertise and IT services to help our clients plan, build and run their critical business initiatives. Through our range of quality-focused delivery models, we meet our clients where they are, and take them where they want to go, the way they want to get there.

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