

Bespoke Training Case Study

Background

We were engaged to develop, pilot and roll out a learning program, Effective Writing for Banking Professionals, based on our experience of leading similar skills development programs in other organisations.

Our client was the credit team within the Corporate and Institutional banking section of one of Australia's top 4 banks. The target participants were Associates and Senior Associates who were responsible for doing the research and analysis required to support credit decisioning. Their main output document was the Credit Submission Report which contained detailed information and recommendations on clients seeking new credit, credit extensions or a routine review of existing lines.

The Customer

The team's customers are the internal Credit Risk Managers who make the final decisions on client credit applications. Customer satisfaction surveys had identified the need to improve the Credit Submission Report which

- was too long
- was difficult to navigate to find specific information
- contained duplicated and/or irrelevant information as well as errors and gaps
- had a 'sales' feel to it rather than presenting the facts to aid decision making.

The Vision

The vision from the internal credit customers was for shorter, more succinct credit requests that were clear, concise and accurate.

The client's aim was for a course that would equip learners with the skills they needed to produce well-written communications that achieved their desired purpose, looked professional and complied with business writing standards.

While the focus was the Credit Submission Report, more frequently used forms of written communication such as emails, internal notes and memos were also included. This was to enable participants to put their learning into immediate use as well as improving the quality of communications that could be subject to regulatory review and subpoena.

Specific Aims

The business wanted

- to move from a 'statement of facts' approach to a 'writing for the reader' approach
- to produce a more professional product that was easy to use, provided conclusions and recommendations and contained clear, consistent and explicit language
- to improve efficiency by equipping writers with stronger writing skills and enabling them to reduce writing time, document length and reading time.

The ADDIE Process

We used the ADDIE model for our design and development process.

| ADDIE Step | This Project |
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| Analyse | <p>This comprised a training needs analysis (in addition to information provided by the business):</p> <ul style="list-style-type: none">• A detailed review of sample credit submission reports provided insight into the common problems being experienced.• Pre-testing and working with the pilot attendees refined the selection of the most relevant topics for coverage in the workshops. <p>Relevant corporate documents such as brand guidelines, report writing instructions, the credit submission template and guidelines defined the standards required.</p> |

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| Design | The initial courseware design took into consideration key adult learning principles especially the need for sessions to be interactive and practical. Particularly successful aspects of this include <ul style="list-style-type: none"> • providing the opportunity to hear from, and question, their customer (reader) directly • encouraging participants to work on an example of their own writing • using samples from actual reports to provide directly relevant examples and exercises. |
| Develop | We refined the course content based on the analysis phase to produce the pilot program of 4 x 3hr face-to-face sessions over a 3–4 week period. Materials developed include detailed facilitator guides, participant workbooks, PowerPoint presentations and before and after tests. |
| Implement | The initial material was piloted with 3 pilot groups of up to 6 learners. Each group comprised a representative mix of writers, associate directors and team leaders from a working team. |
| Evaluate | Participants provided detailed feedback at the end of the Pilot. Managers and reviewers who attended the course also participated in a 2-hour workshop to define what constituted “a good report”. This together with the participant feedback became the basis for the revised course. |

We have repeated this process over several years to adapt the material to changing needs and circumstances. In the current program, participants spend the bulk of their time working on highly relevant exercises to develop their skills.

The Outcome

To date over 95 participants Australia-wide have attended the program. Our program is part of the blended learning approach that includes formal credit analysis training, on-the-job feedback and mentoring.

The writing program comprises:

- a pre-course test that enables the facilitator to get a base line for each particular group. It also identifies any participants who may have particular problems or needs so that these can be taken into consideration.
- the 4-hour workshop **Writing Clearly and Concisely** that focuses on improving expression and readability at the sentence level
- a piece of homework to reinforce the skills just learnt
- the 4-hour workshop **Writing for your Reader** that focuses on the whole document especially its purpose, structure and organisation and best practice in presenting facts and arguments
- a post-course test 6-weeks after the workshops to measure behaviour change.

Participant Feedback

Feedback continues to be very positive with over 80% confirming they have changed the way they write.

Repeatedly, participants have confirmed the benefit of working in small groups (6-8) preferably from the work-based teams, using morning sessions as much as possible, spreading the course over 2 weeks, using laptops and the participation of the Credit Risk representative (their customer).

*This course made me rethink the way that I write, and provided guidance on how to organise lots of information. **Senior Associate***