

# How AXIOM Provided Training For A Nationwide Software Rollout

## Background & History

A global financial services firm was seeking a long-term relationship with a company with a similar global perspective and commitment to excellence and innovative technology as themselves. AXIOM Learning Solutions was invited to submit a proposal to support the client's high priority initiative to train their personnel in the Wealth Management field offices throughout the US. AXIOM was one of several firms selected to provide a proposal for the training rollout.

AXIOM's 20+ years of experience in providing professional training resources, conducting large scale software rollouts, and project managing multifaceted projects led to us being the only firm selected to provide services for the engagement. The project included a train-the-trainer followed by the execution of the training itself. AXIOM provided 35 trainers who were assigned to a specific territory in the U.S. and traveled and rotated throughout the client's field branches. Their role was to provide structured training and support to all users. The training was conducted via a variety of training methods and on a number of topics, ultimately supporting a new software implementation. By becoming a part of the client's existing training team, AXIOM was able to leverage both the experience of the client's internal trainers and existing infrastructure, as well as the expertise of AXIOM's training resources, to ensure everyone was positioned for a successful engagement.



## Challenge

To train all field personnel across the country



## Partnership

High level of trust and expertise



## Success

All US field personnel proficient in new technology in under 3 months

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## Results that Speak Volumes

The training rollout comprised of 35 Field Trainers and 1 Resource Lead. Forty (40) plus AXIOM trainers attended a three week, classroom-style "train-the-trainer" (T3). The T3 included hands-on and hands-off training, practice, and teach-backs to determine satisfactory competency was attained. Resources were not accepted until they successfully passed the teach-back portion of the T3.

Of the 40+ people who attended the T3, through their rigorous testing and assessment process, the client accepted 36 AXIOM resources; 30 were in the field at any given time and the remainder were on a bench to fill in for unexpected events. All resources were rotated throughout the schedule and were sent to a multitude of locations.

During the course of the 4 month engagement, resources were required to travel on weekends and be on-site at the client's offices from Monday to Friday.

It was a rigorous schedule and a demanding engagement, but the AXIOM team shined! The client's executive team was very impressed with the knowledge and skills had by the trainers, as well as the project management, organization, and communication skills that were demonstrated by the Resource Lead.

