

Enabling Performance through Web-Based Training, Online Help, and Performance Support Systems A Large Financial Services Company

Background: This large financial services company is a wholly-owned subsidiary of an internationally known financial corporation. For over a decade, the company has been the leader in patient financing by focusing on low rates to patients and best-in-class customer service to patients and practices.

The large financial services company offers flexible patient financing programs for a variety of healthcare industries:

- Dental
- Cosmetic
- Vision
- Orthodontic
- Fertility

Healthcare providers offer financing to their patients to increase customer service and to grow business. Because providers determine which financial company and plan to offer, catering to the needs of providers is key to the financial services company's success.

In 2006, the financial services company created a web-based application that allowed providers to create and submit loans while the patient was in the office, and helped providers monitor and manage their loan pipeline. For the financial services company, this project represented "the biggest development project in the history of the growing business."

Challenge: The financial services company knew that they needed to help providers – and their internal staff – learn about and use the web-based application. However, since the tool was new, many work processes and procedures were undefined and others required modification.

It was determined early on (with Entelechy's help) that web-based training (WBT) and online user help would be the primary training and support methods for providers. Unfortunately the financial services company did not have experience in creating customer-facing training and online support tools. The company knew that the web-based application would be only as effective as the providers using the tool; and that enormous risk – and reward – lie in effective support mechanisms.

Solution: The Training Manager at the financial services company called on Entelechy for broad support that included:

- Training Consulting
- WBT Design and Project Management
- User Help/FAQ Documentation
- Desk/Job Aid Creation
- Sales Training
- Operations Training

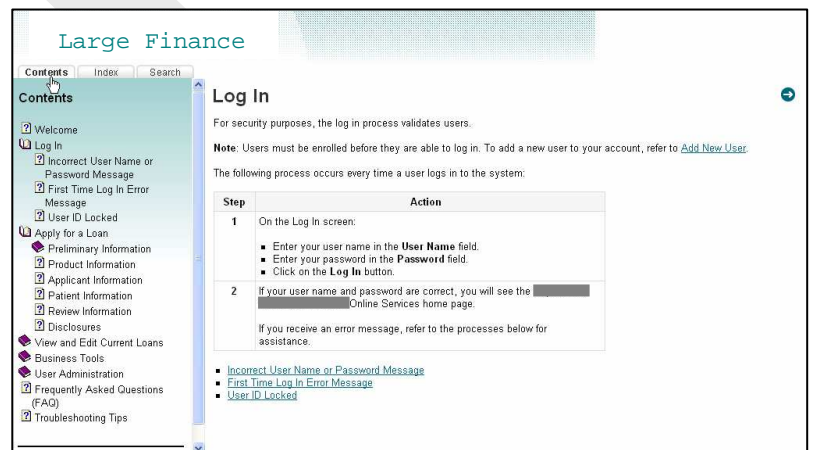
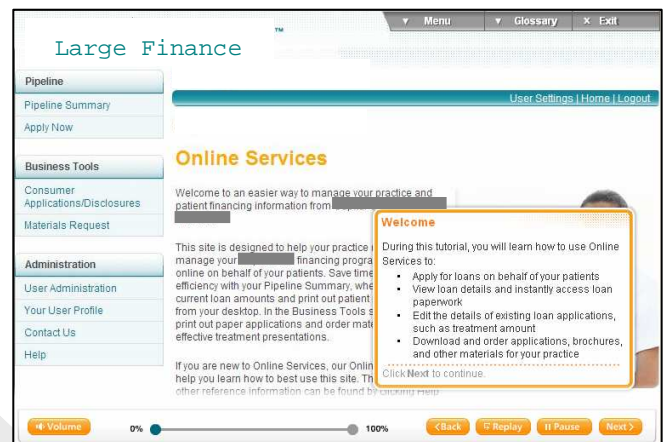
Entelechy determined a strategy whereby we would help articulate the new workflow processes and procedures and create a “User Guide” repository from which we could create WBT, online user help, desk aids, sales training, and operations training.

Web-Based Training

Entelechy worked with the financial services company E-Learning team to select and manage a WBT vendor from design, through development and internal review, to deployment. According to the company’s project manager, we created “excellent web-based training (professional, sleek, and EASY to use!).”

Online User Help

Entelechy created the online User Help that was married with the web-based application to provide a seamless, real-time access to detailed help. The online User Help was created by Entelechy using Easy Help™ (and modified by Entelechy’s webmaster).



Quick Reference Guide Desk Aid

Entelechy worked with the financial services company's marketing team to create a desk aid that would serve as a quick reference for providers. The tool was designed to complement – not duplicate – the WBT. As such, the desk aid included a system requirements section, a “getting started” section, a trouble shooting section, and sections for important but complex tasks.

Sales and Operations Training

Entelechy created and helped facilitate the company's internal training to sales staff, help desk staff, and operations staff to ensure that everyone knew how to position and/or support the new tool with providers. The training was targeted for each audience and included significant hands-on use of the web-based application.

Results: Entelechy was able to provide expertise to all facets of the project. Our approach to gathering/creating work procedures for this new application not only provided content for training and support tools, it enabled us to identify software problems and potential issues early in the process, allowing time for the software development team to address the problems and make improvements.

Additionally, our expertise ensured that the training and support was geared at the appropriate level for each audience. For example, knowing that the audience for the WBT would be providers, we recommended a balance between marketing and training – there would be **no** tests in this WBT and interaction would be kept to a minimum allowing learners to complete the training rapidly and relatively unfettered.

Director of Training stated, “This was a big important project for us because it was our first customer-facing WBT. We were very careful in selecting a vendor who we could trust completely. Entelechy fit that need and the resulting training received rave reviews by my customers and internal stakeholders.”

According to the financial services company's VP, “An amazing amount of time and energy has been spent developing a top notch product - one that we can all be proud of! The portal will greatly enhance our ‘ease of use’ proposition helping to ensure we continue our amazing growth trajectory.”

With Entelechy's help, the financial services company is on target to leverage the web-based application to account for almost \$100,000,000 in annual funded volume with a net present value of \$6,000,000. Staff and user proficiency play key roles in the success of the application, and Entelechy was integral to ensuring that proficiency.

