



## Global Financial Services Firm Sought Global Professional Development Partner



### CHALLENGE:

**This global financial services company (230k+ employees; operating in 140 countries) was seeking a best-in-class supplier for IT training and services.**

The firm's training program consisted of a decentralized vendor ecosystem that generated more than 1,000 independent training requests, executed by well over 100 external vendors. These complexities made it difficult for the firm to consistently and effectively develop a technically capable, business-savvy workforce.

80% of training was ad-hoc; not aligned to enterprise strategies

Training often not linked to strategic initiatives

Inconsistent governance of training delivery, quality, and results

Inability to leverage economies of scale

Significant inefficiencies due to countless, and varied vendor processes, and invoicing

### SOLUTION:

Learning Tree was selected as the preferred vendor based on past performance and global training capabilities. Using a managed training supplier model, Learning Tree was able to provide a higher level of customer service, resulting in significant cost savings.

### The Learning Tree Solution:

- **A dedicated program manager** to lead internal operations and 3rd party requests
- **A professional development program with built-in custom curriculum** for multiple lines of business including the Global Consumer division, Institutional Banking, and the Enterprise Project Management Office
- **We provide a holistic approach -** technology, leadership, business acumen
- **Support global delivery** to employees in over 20 countries

### KEY OBJECTIVES

- Reduce aggregate vendor management costs
- Transition to globally-focused, modular-design, virtually-delivered private group professional development
- Professional development incorporates firm-specific requirements

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## THE RESULTS:



**DIVERSE, GLOBAL & TRUSTED**  
Learning Partner since 2007



**1,500+ PRIVATE GROUP TRAINING EVENTS**  
Onsite/Virtual



**22,000+ EMPLOYEES TRAINED**  
in Leadership, Management & Technology Competencies

**Leadership:** Conflict Management; Business Writing & Presentation Skills; Strategic Change; Conflict Resolution; Business Relationship Management; Building High-Performing Teams

**Functional:** IT and Business Frameworks, Governance, Architecture; Project Management; Business Analysis; Data Modeling & Analysis

**Technology:** Software Development; Data & Security; Engineering; Networking; Virtualization; DevOps

**End User Productivity:** Microsoft Applications; Graphic and Web Design Applications

### Key Call-Outs

Global support

Virtual course delivery for globally dispersed teams

Managed learning program that comes at zero cost to the client

Competencies across IT and leadership

Customized webinars – tied to specific learning programs

- PM Awareness Week
- Sponsored speaking events

10 Years of a Successful Learning Partnership:



1,950+ Events Delivered



42,000+ Attendees Trained in 20+ Countries across the NAM, APAC, EMEA & LATAM regions



3.67 (of 4) Overall Course Grade Average



3.79 (of 4) Instructor Grade Average

