# OCM and End User Training for Commercial Lending System upgrade

*Designed a Change Management and Training program to support a commercial loan system upgrade for a large financial institution*

Fortune 500 US based Financial Institution

- Strategize
- Implement

## Challenge

Client has been utilizing the AFS Level III Commercial Loan System since 1988.The client is preparing to expand and evolve to meet industry demands.

- Approximately 7,000 impacted system users across approximately 15 disparate lines of business

- Multiple projects and corporate merger have created change fatigue

- Current training and knowledge artifacts are not centrally maintained resulting in reliance on other departments for assistance

- Majority of stakeholders are moderate to infrequent, view-only users that require performance support over formal training

**The Challenge:** Design and deliver an OCM approach that aligns with the standards of each line of business and meets their unique communication, training and support performance needs.

## Solution

NTT DATA Services developed and delivered a scalable and sustainable OCM approach that aligned communications, engagement, capability development, and performance support to the needs of the users.

- Analyzing stakeholder impacts and needs with leaders to reach consensus on best communication vehicles and timing as well as user learning modalities and paths

- Drafting a communications and engagement approach and plan that minimizes repetitive messaging while engaging and involving stakeholders through leadership engagement and Change Champion meetings and workshops

- Creating a curriculum by topic (or work instruction) that allows content/courses to be built according to user needs.

- Each work instruction becomes a performance support artifact accessible in the user's flow of work via the system help link

## Success

- Each line of business receives the communication, engagement opportunities and training that their users require. We are designing **role-based training for each job family** around the most frequently used screens in AFS to **decrease training on functionality users do not need.**

- Animated **marketing videos introduce the program** to all stakeholders in a non-threatening way.

- **Subject matter experts, client business partners and LOB leaders are actively involved and engaged** to ensure successful adoption of their users through attending meetings, helping to build training and system demos, or acting as a SME or Change Champion for their area.

- **Linking training content to AFS Help functionality**. Getting help is faster. Users no longer need to call the help desk to answer system navigation questions.

**Services Delivered:**
- Future State Process Maps
- Gap/Benefit Analysis
- Stakeholder Analysis
- Communication and Engagement Plans
- Training Strategy and Plan
- Training Content

**Memorable Milestone:**
NTT DATA is providing a performance support solution for moderate to infrequent system users that will mitigate the number of phone calls to the help desk or other departments for assistance.

Users can now access navigational help when they need it from within their workflow.