FIRST DATA CORPORATION IMPROVES TRAINING EFFICIENCY WITH ADVISOR ENTERPRISE

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>
> Ron Hackbart
> Project Manager, First Data

CLIENT

First Data provides the invisible engine that powers today's global shift to a cashless economy. It processes and safeguards every type of electronic payment including credit, debit, stored-value and smart cards, electronic checks and cash. First Data also provides Electronic Funds Transfers as well as card issuing services for financial institutions and millions of customers worldwide.

CHALLENGE

First Data recognized that in order to improve training services, training divisions needed formal processes to assess the needs of their clients (business units) as well as effectively communicate their recommendations.

Once key processes and decision points were identified using Six Sigma, it was apparent that determining how training should be delivered would be particularly challenging. Clients were requesting delivery methods based on formulated perceptions, and designers favored delivery methods that were within their area of expertise. As a result, decisions were driven by perceptions and comfort level, instead of what was best for employees and the organization. To overcome this challenge, an objective decision support tool was needed that would recommend the most cost effective blend of delivery options based on clients' needs.

SOLUTION

A number of spreadsheet options were initially investigated with disappointing results. They either consistently favored one delivery option regardless of the input or were highly subjective – i.e., recommended opposing delivery options for the same training program when analyzed by different individuals.

A New York University instructor introduced members of the First Data training team to ADVISOR Enterprise. Upon further investigation, it was apparent that ADVISOR was far more robust than any other option they had investigated. ADVISOR minimized subjectivity by focusing on training requirements and documented assumptions, then generated comprehensive reports to support recommendations.

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RESULTS

The following benefits have been reported by First Data, three years after ADVISOR Enterprise was first introduced:

❑ Helped analysts identify data needed for the analysis, collect relevant data from the client, analyze the data, recommend the most cost effective blend of delivery options as well as inform the client why a perceived solution is not as effective or economical.

❑ Enabled analysts to persuade designers to consider delivery options that extend beyond their area of expertise by presenting a solid business case to support recommendations.

❑ Facilitated the process of dividing training material into modules, classifying the level of knowledge conveyed in each module (i.e., awareness, understanding or ability to use), identifying who needs access to which information as well as the best delivery option for each module.

❑ Encouraged analysts to challenge assumptions and pursue the facts needed to make decisions. "We were surprised to discover the percentage of our employees that did not have access to computers, Internet connection speed at various locations and limitations imposed on the downloading and installation of plug-ins – all of which could have adversely impacted access to training material".

By focusing on clients needs, linking recommendations to identified needs as well persuading both clients and designers to consider the most effective and efficient solution, First Data has successfully migrated many instructor-led courses to Web Based Training and Virtual Classroom. In addition to reducing training costs and increasing employees productivity by minimizing travel and time away from the job, under utilized training facilities were converted into computer labs to facilitate testing and further innovation.

FINAL REMARKS

ADVISOR is an outstanding tool, although I understand why at first glance some may be intimidated – since most analysts do not have immediate access to the data considered by ADVISOR. However, once the data has been captured, you gain a much better understanding of your organization and how each factor impacts training effectiveness and efficiency. In turn it enabled us to transition from "we think that …" to "this is the best way to …"

CONTACT INFORMATION

For more information on this project or how ADVISOR can assist you identify ways to run your training programs more effectively and economically, please contact:

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