



## Case Study

# A Global Banking Leader Accelerates Digital Transformation Through a Custom Blended Learning Program

[cprime.com](https://cprime.com) | 877.800.5221 (US) | +44 (0) 203 811 0424 (UK)

Copyright 2023 © Cprime Inc. All Rights Reserved.

Do not share without express written consent.



## Company Details

**Industry:** International Finance and Investment Banking

**Company Size:** Over 300,000 Employees

**Location:** USA, With Regional Offices Worldwide

**Products:** Asset management, banking, commodities, credit cards, equities trading, insurance, investment management, mortgage loans, mutual funds, private equity, risk management, wealth management

**Cprime Services:** [Agile Training](#), [Digital Learning as a Service](#), [Group Training](#)

## Executive Summary

In an effort to constantly streamline and increase the value they deliver to their customers, this financial services leader launched a large-scale digital transformation that would span years. To support such a massive undertaking, they turned to the learning experts at Cprime to develop role-specific learning opportunities that would prepare their software engineers and development support teams to thrive in the faster-paced Agile environment they'd envisioned. The results have been remarkable.

## The Client

Few financial institutions offer greater depth and breadth of services than this U.S. based global banking and investment leader. Besides retail and commercial banking services, they are also a custodian bank for many of the financial industry's largest hedge and investment funds.

We began working with the organization in 2014 and the relationship has grown and strengthened over the years. In 2019, it took a huge leap forward when we took on a new initiative to deliver the company's proprietary software engineering onboarding and training courses globally across six time zones. (To learn more about that epic undertaking, [read the case study here.](#))



## The Challenge: Onboarding and Upskilling a Global Development Organization

The need for qualified software engineers and DevOps professionals has been speeding up globally for years and shows no signs of slowing down. The financial services industry is no exception, and a large digital transformation necessitates new roles and qualified professionals to fill them. So, our client found themselves in a familiar position: needing to prepare a large number of existing team members to thrive under a new way of working even while zealously working to transform their development organization to support enterprise agility.

With a software engineering workforce numbering in the thousands—and constantly growing—this was no small task.

Fortunately, Cprime had already cultivated a strong and mutually beneficial relationship with the company that already spanned nearly six years.

Alex Gray, Cprime's Lean Agile Practice Lead on the engagement, explains, "It was really the relationship and reputation we'd cultivated with the software engineers onboarding training that encouraged them to approach us about this new program. We were glad to get the opportunity."

So, when this initiative began in 2022, they trusted us to get it off the ground.

## The Solution: Custom "Blended Workshop" Learning Pathways Delivered with Speed and Finesse

Unlike our previous learning engagements with this client, they asked us to generate custom coursework rather than facilitating courses they had already developed internally. The initial request was for an e-learning course for Scrum Masters (referred to as Agile Leads within the company), so that's where we began.



## An initial plan for the learning pathways

“Our first step,” Alex says, “was to develop a storyboard outlining the general learning objectives for the e-learning course, and how the modules would progress. We put that together and reviewed it with the client leadership team.”

After iterating on the storyboard, they fleshed out the content within that framework. The goal for the e-learning course was to cover the core fundamentals any new or existing Agile Lead would need to know to succeed in their role. Rob Hill, a Cprime Learning Consultant, explains, “This was a combination of standard Agile concepts and best practices combined with terminology and processes unique to the organization, designed to get Agile Leads at various levels of experience up-to-speed quickly.”

Once we developed the initial content and the client approved, we collaborated with a partner vendor that created the actual course using Adobe Captivate. These experienced practitioners made suggestions around visuals, format and frequency of quizzes, and the general flow of the learning path. Where it added value, we implemented the changes before coming back to the client with a completed SCORM file. They uploaded that to their Learning Management System (LMS) so they could securely host the course internally and students could access it through their Learning and Development portal.

“

It was really the relationship and reputation we’d cultivated with the software engineers onboarding training that encouraged them to approach us about this new program. We were glad to get the opportunity.

— Alex Gray, Cprime Lean Agile Practice Lead

”

## Developing the blended workshop approach

“Although the e-learning course was very good,” Alex says, “we felt there would be tremendous value in giving the students the opportunity to interact with each other and expert instructors. So, we developed a complementary instructor-led workshop as well.”

Students completed the e-learning course remotely and at their own pace. Then, in small, structured cohorts, they would come together in the workshops (virtually or in-person) to discuss what they’d learned, ask questions, and run through several interactive exercises.

Rob continues, “This blended learning approach offers students the best of both worlds: the ease and convenience of e-learning and the enrichment of a more traditional face-to-face workshop so they can apply their knowledge to real-world scenarios and get some experience working with the new concepts. More practical, less theoretical.”

## Expanding to meet growing demand

The Agile Leads course thrilled the client, so they requested more courses in the same format for additional roles.

Thus far, we have developed blended learning courses for:

- Agile Lead
- Product Owner
- Agile Lead Coaching
- UX Designer
- Engineering Lead
- Product Adoption
- System Architect

Additionally, we have developed these instructor-led courses:

- Agile Architect
- Agile Designer
- Agile Engineering Lead
- Agile Product Owner
- Agile Scrum Master
- Agile Stakeholder
- Agile Story Writing
- Agile Customer Centricity
- Defining your Product Roadmap
- Implementing Kanban
- Agile Team Transformation
- Agile Product Adoption
- Agile Stakeholder Management
- Agile Coaching
- Shift Left

Alex adds, “As the organization continues scaling their Agile practice and the teams mature, they have requested courses covering more mature subjects and advanced roles.”

## **The Results: Top Scores from Students and Enhanced Trust from Leadership**

The results of this training program have been remarkable. Over 4,700 students have gone through the programs Cprime has developed since 2020. And feedback has remained very positive nearly across the board.

## Feedback scores of 4+

"We request feedback from every student, and it has thrilled us to find nearly all of them have rated the course material and the instructors at four or better out of five," Alex says. "We've heard comments like, 'this wasn't like any other classes I've taken—I feel like I can go out immediately and use what I've learned.' That's really gratifying."

Of course, perfection is unrealistic. In one case, a trainer we brought in simply didn't mesh well with the teams and we saw some negative feedback as a result. So, we immediately rectified the matter and feedback scores rose again.

"In some ways, negative feedback is even more valuable because it supports our and the client's mutual commitment to continuous improvement."

## From trainers to trusted advisors

Alex concludes, "I think the most telling result of this engagement is how our relationship with the client has expanded. They already considered us excellent trainers. But now, they view us as trusted advisors, which is exactly what we want to be. Whether it be refining the courses in play or considering where new courses may be of value, we're working together to deliver the greatest value to the organization."

## Could Your Company Benefit from Results Like These?

Explore our [training solutions](#) today and speak to a learning expert so we can help your organization achieve something similar.



## Featured Team Members

---



### Alex Gray

*Lean Agile Practice Lead*

Alex is a professional, versatile and enthusiastic Certified Scrum Trainer® / Lean & Agile Coach. He has well over two decades of experience working in technology teams and over a decade of that experience working in agile transformations. Alex has worked in complex environments for organizations from medium to large in size, in many sectors including financial services, medical, gaming, telecoms, and others.



### Rob Hill

*Learning Consultant*

Having worked for over 20 years in both the private and public sector, Rob has vast experience leading and instigating transformational change through the use of digital technology. Rob is a certified Scrum Master, Product Owner, DSDM and Kanban Practitioner.

## About Cprime

---



Cprime is an industry-leading, full-service global consulting firm with a focus on providing integrated and innovative solutions around digital transformation, product, cloud, and technology. With over 20 years' experience, we provide strategic and technical expertise to businesses across more than 50 industries. Our team of advisors and technical experts have the know-how to meet organizations where they are to develop actionable solutions and solve business challenges. We also collaborate with our expansive network of partners to design, deploy, and harmonize technology stacks across organizations. Our mission is to empower visionary business leaders and teams to reimagine the future of work to achieve better outcomes.

## Cprime Partnerships

With over 30 partners, Cprime is committed to growing mutually beneficial alliances to deliver more value across all of Cprime's Trainings, Products, and Services. [View All Partners](#)



Platinum  
Solution Partner  
ENTERPRISE



Jira Align  
SPECIALIZATION



Project  
Management  
Institute.

