



# Custom Education and Communications Increase **Acclimation,** Knowledge, and Proficiency

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*A Fortune 100 financial services company with \$30 billion in operating revenue, faced an employee-communications challenge. The publicly traded company based in Columbus, Ohio, provides a variety of financial services that help consumers invest and protect their long-term assets.*

## The Challenge

The company made the strategic decision to upgrade its Siebel Sales application. A longstanding partner of Abreon, the company wanted to ensure optimal training compliance and application adoption for their upgrade.

*The CBT incorporated text and simulations to deliver information with a scored post-CBT assessment to gauge the user's level of Siebel competency.*

## Our Solution

Due to the large scale, Abreon consultants worked with the client to develop a detailed education and communication campaign to decrease user resistance, promote utilization, and increase productivity with the new software. As part of this larger solution, Abreon developed a customized communication campaign, which included Siebel upgrade information and its benefits, delivered through a variety of media. The communication campaign included:

- Web event
- Series of informative emails
- Commercial detailing the benefits of Siebel
- Meeting notes for managers to talk about the Siebel upgrade
- Posters to promote awareness

The educational portion of the solution leveraged a blended-learning approach that included an hour-long computer-based training (CBT) program used to baseline end-user knowledge of Siebel and instructor-led training. This blended-learning approach addressed Siebel Sales functions that included synchronization, calendar management, viewing and searching for client and product information, and business expense. Instructor-led training was delivered to over 300 members of the company's financial services team. These individuals received two quick-reference guides customized to their own internal sales and service staff, as well as external wholesalers. The CBT incorporated text and simulations to deliver information with a scored post-CBT assessment to gauge the user's level of Siebel competency.

## The Results

Abreon's comprehensive solution helped the client's team acclimate to the upgrade, increase their knowledge of the application, and improve their proficiency.

*For more information regarding communications strategy, technology adoption and corporate training offered by Abreon, Inc., call us at 1.800.338.5185 .*



## More about Abreon

With over 30 years of experience implementing change for the Fortune 500, Abreon transforms organizations by empowering their people to embrace the benefits of change. Our people-centric approach employs customized strategies that align, engage and educate people as they navigate change to produce measurable results. With more than 250 credentialed consultants, Abreon has the experience, talent and change agents to move your people forward.



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