

Training various business systems for global Insurance firm

Salesforce.com and R13K



Aon, as one of the world's largest Insurance firms, implements new business systems and processes in a constant quest to improve productivity and effectiveness. Supporting these implementations with end-user training requires significant resources that vary on a project by project basis.

Rather than maintain a large in-house team or resource and buying-in expertise separately for each project, Aon sought to outsource all business system training to a single provider. This provider would need to offer a consistent approach to end user training, while maintaining a core competence in Aon operations. Aon also required a cost-effective and hassle-free way to manage resources and the immersion of the Aon team into an environment entirely focused on the delivery of professional training solutions.

Optimum was chosen as the training provider. Optimum was required to continue to deliver 'business-as-usual' training on business systems as well as provide support for new rollouts and upgrades.


Optimum's first task was to ensure full coverage of all the requirements by cross-training some of their own consultants onto Aon's contract certainty, document management and processing systems. The next priority was to

Project Scope

- Implementation of Salesforce CRM and R13K systems.
- Optimum delivered all of the business-as-usual courses.
- Development and delivery of end user training to support new implementations or upgrades.

Methods Used

 **RapidScope®**
Planning & designing your training

 **Reference Guides**
Comprehensive end-user manuals


 **Trainer Packs**
Lesson plans for consistent delivery

 **Presentations**
Demonstrations to large groups


 **Online Solutions**
Various web-based learning options

 **Quick Cards**
Double-sided simple process cards

 **eLearning**
Interactive modules & passive videos

 **Skill the Trainer**
Prepare internal team for delivery

 **Classroom Delivery**
Hands-on training sessions

 **Go-Live Support**
Onsite floor-walking and hypercare

Since starting to work with Aon, Optimum has successfully put together training teams for several implementations including Salesforce.com, R13K, e-processing and new processing systems.

ensure that the Aon team was successfully integrated within Optimum and that they expanded their portfolio of training skills and knowledge.

In this way, Aon has access to a large pool of training specialists who are experienced in Aon's systems and business processes and Optimum had extended the range and size of its training team from 20 to 25 trainers. In addition, the Aon training team also benefited from enhanced professional development opportunities.

At this time Optimum also took on responsibility for all training administration and management.

The full service provided by Optimum included:

- Full administration support including the posting of courses on Aon's LMS, monitoring of take up and attendance, creation and submission of monthly training reports
- Delivery of business-as-usual courses to a schedule
- Development and delivery of end user training to support new implementations or upgrades, which required a larger team than the original five
- Management of the training room schedule

- A dedicated training manager, who meets with Aon's IT Director and departmental training representatives to ensure the training offering is tailored to current and future business needs

Since starting to work with Aon, Optimum has successfully put together training teams for several implementations including Salesforce.com, R13K, e-processing and new processing systems, together with cross-training staff in new applications following the acquisition of Benfield. The initial contract has just been renewed for a further 3 years.



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