

Problem

An established European financial services firm hires more than 100 new staff every year. As part of the on-boarding process, new employees are given an interactive PDF training log to complete within the first two months of their employment. Due to the course design, staff must complete the training in the office using a networked desktop computer.

After reviewing employee data for the previous year, senior management decided to overhaul the training program. Although 100% of new staff completed the training before the deadline, more than 60% completed the training in their second month of employment. This presented a problem for the business because without completing the training, new hires could not begin to prospect new clients or work on existing client accounts. Senior management felt that this was an ineffective use of a new employee's skills and experience and could result in lost business opportunities.

Research Findings

Due to limited scope, budget, and time, I was unable to engage in a proper research/design discovery project. Instead, I relied on internal, anonymous employee data provided by the Human Resources Department. From this data, I was able to establish particular training patterns. For example, more than 40% of experienced hires completed their training days before the deadline whereas almost 30% of graduate hires completed their training within the first two weeks of employment. Alongside the employee data, I used various online resources, articles, and blogs on how to build and staff development and training plans. I also researched learning methodologies for adults and best practices for information retention and proven test and quiz patterns.

Proposed Solution

To demonstrate an improved, more flexible way of delivering training, I created a mockup with Adobe Creative Suite and Axure RP. The mockup was designed to show how training could be delivered via a tablet app. Although most staff used laptops for their day-to-day work, I created the mockup for a tablet because senior management are considering a proposal to provide each staff member with a tablet. To increase the value proposition of the tablet proposal, I suggested that the tablet could be used for client-related and on-site work and for ongoing education and training. I also recommended that the courses be designed in a way so that the user does not need to be connected to the company network via a local area network ethernet cable.

The mockup includes a sample information or terminology definition page, a quiz page with both correct and incorrect answers, and a summary page. Feature-wise, the quiz provides instant feedback as academic research has shown that giving test takers feedback immediately after they answer a question – as opposed to at the end of the test – is better for information retention and learning. After users complete the quiz, they are given a summary page to reinforce core concepts before proceeding on to the next topic.

Notes

The enclosed mockup is a high-fidelity mockup. I originally wanted to create a low-fidelity mockup because the entire project is still in a very early discovery/research phase. However, due to limited time and scope, I was asked to create a high-fidelity mockup so that the company's senior management team could make a direct visual comparison between the proposed solution and the existing training program.

Investment Portfolios

Conservative Income Portfolio

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Investment Objective: Providing an immediate and stable source of income along with potential for modest long-term capital growth.

Target Audience: Investors seeking a stable and consistent source of income due to change in employment and/or lifestyle.

Recommended Time Horizon: Medium-term

Risk Tolerance: Low



Which customer matches the profile of a customer that would benefit from a Conservative Income Portfolio?

Select the customers that matches the Conservative Income Portfolio profile

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Risk Tolerance: Low



Jennifer

Timeline: 5 years

Investment Goals: saving for a downpayment for a new home

Risk Tolerance: not comfortable with wild market swings; would prefer stability



Thomas

Timeline: 25 years

Investment Goals: Seeking longer-term growth for future retirement goals

Risk Tolerance: comfortable with market swings and cycles



Mohammed

Timeline: 15 years

Investment Goals: saving for his only daughter's education fund

Risk Tolerance: comfortable with potential losses in exchange for larger returns



Sarah

Timeline: 5 years

Investment Goals: saving for a 6-month trip around the world

Risk Tolerance: high - willing to deal with fluctuations for the possibility of higher returns



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Summary

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