Abbey transforms learning delivery with Innate's resource management software

Financial services company Abbey, now part of the Gruppo Santander bank, faced a major challenge in the organisation of its internal training programmes., Abbey's Learning Delivery Division is responsible for scheduling and delivering over 108,000 delegate days each year across 120 course titles and many UK sites.

The 130 Learning Delivery staff encompass the wide range and level of skills and accreditation necessary to deliver existing courses and develop new courses and course materials.

Abbey Learning Delivery's goal was to dramatically improve its processes for scheduling and resourcing its total development and delivery workload, to publish firm and robust training schedules, to demonstrate efficient use of its skills and resources, and to automate its management reporting. It needed to replace its inefficient manual processes and spreadsheets.

The software tools Abbey chose to solve the challenge were Innate Resource Manager and Innate Timesheets, which were quickly implemented and are now delivering the benefits envisaged.

The Challenge for Learning Delivery

Like all major financial institutions, Abbey training courses focus on key issues in the financial services sector in addition to courses designed to develop management, personal and professional skills common in other sectors. They include training in the company's current sales programmes and how to comply with the mounting regulatory changes within the financial services sector. For example, The Financial Services Authority (FSA) is active in issuing regulatory and guidance initiatives – such as those based around the Basel II corporate governance regulations. And it is also vital for staff to be able to identify and deter activities that misuse the banking infrastructure, such as money laundering.

"Keeping up with regulatory and other requirements means that we need to refresh the knowledge base of our staff regularly

and as a result there are now around 120 courses that we must provide to our employees to ensure that their knowledge is at an optimal level," says Stephen Wass, Learning Project Manager at Abbey.

"We need to schedule the courses, making the best use our staff's skills, and be able to plan the development of new courses. And we need to demonstrate that we are in control of what we're doing", says Wass. "We must show we know".

Until the introduction of the Innate systems, multiple spreadsheets were used to plan and resource learning programmes at Abbey, but were proving inadequate for the task. It was difficult to plan development of new courses, it was hard to cope with short term changes, trainers did not have visibility of their planned workload; the peaks and troughs were not easy to see; management reporting took a lot of manual effort; and Learning Delivery could not show that it making effective use of its people.

"Managing such an extensive set of learning programmes using manual processes - such as spreadsheets, email and fax – created an unwanted management overhead and failed to meet the rising demands being placed upon the training operation," says Wass. "We needed a solution that would better support Learning Delivery, by having all the relevant data in a single database accessed through our web browsers."

Abbey Learning Delivery chose Innate for a number of reasons, though they did consider other more complex solutions. It had a good reputation within Abbey having been in use in Abbey's Technology Division (IT) for a couple of years. "Our detailed requirements were very different from those of Technology, but the Innate tools are very flexible so we could tailor the system to fit with our organisational needs," Wass explains. "Essentially it fits into the organisation rather than the organisation having to fit around the system, which is more often the case. And importantly it was quick to implement."

What the new system delivers

The system comprises Innate Resource Manager and Innate Timesheets, on a single database hosted (in this case) on Innate's servers, and all users access it through their browsers from home or office (with a high level of security) over the internet. With minimal effort, trainers see their own planned workload for the next eight weeks on their Innate Home Page, while other users have extensive permissions to request or supply resources and to view and modify the data in other ways.

The whole workload of the Learning Delivery Division is included, most of it around course design, development and delivery. Staff details are extensive, so that schedulers can match the requirement for each assignment based on their roles, skills, location, and learning zone specialism.

ABBEY CASE STUDY_____

Of great importance to Abbey is the fact that the system holds details of all the courses that each Deliverer is accredited to teach; in many cases, such a trainer can deliver 30 or 40 different courses, and the system's ability to search for available resources with the right skills is vital.

The use of Templates also make it easy for Abbey to develop plans for new courses, covering all the main phases - scoping, design, development, train the trainer and so on.

A whole range of reports shows the planned workload, where the overloads and underloads are, and what work is still not assigned to a real person. And reports from the simple timesheets system, shows where the time actually went against where it was planned.

Implementing the system

"Implementing the Learning Delivery system took only two months and the software installation itself was straightforward, with the majority of the time taken up with streamlining internal processes and ensuring that robust security frameworks were in place," says Wass.

Abbey went live with the system in January 2005, after a relatively short development life cycle, with both Timesheets and Resource Manager applications being activated simultaneously.

"We have made notable savings in external resources, because we have been able to plan better."

- Steve Wass

Abbey used 20 days of consultancy (more than would usually be required for an implementation of Innate systems) to ensure the project would be a total success. In fact, Wass comments that while using the consulting time was an extra undertaking, it ultimately produced a superior result.

The results

"The visibility of status in the learning department has risen significantly with the new system," explains Wass. "There are inevitably peaks and troughs in any schedule, in particular with a wide-ranging set of training programmes. Through using the Resource Manager software it is easier for Abbey personnel to even out the schedules. This is achieved through the integration of all the key data our people need regarding the learning programmes."

Wass continues, "We can easily see what our key people are working on, ensure that their capabilities are being used to best advantage, and can see when they will become free. The forty project managers working the learning management system can book resources based on controlled and accurate data. This means that doubled up bookings for training sessions cannot occur owing to the accuracy of information available. And access to the system is based on permissions, removing the risk of

_____**Innate Management Systems**

accidental or deliberate tampering with the information sets."

Abbey Learning Delivery now has an eight-week view of its courses. The result is improved attendance at courses. And easier access to information means that staff can organise their schedules further in advance. However, the trainers have to travel around the UK to deliver the learning programme. "With a centralised and responsive scheduling capability in place, it is much easier to arrange the rosters for these key personnel," says Wass.

Abbey trainers can now be assigned specific areas, or locations within closer proximity of each other. "Such a capability was not possible before implementation of the Innate systems," explains Wass. With better management of resources available, the trainers can be scheduled to work progressively across different parts of the UK, rather than criss-crossing between different locations that may be some distance apart.

"The Innate Timesheets system is so easy for the users that we now get a 97% timely compliance, compared to 65% when we were using spreadsheets. This means that the Division can build up metrics on the effort needed to create new courses".

As for management reporting: "Prior to the implementation of the Innate system, collating and preparing Key Performance Indicators, or KPIs, for management required three to four days of analysis. Now this task takes only 15 minutes – a huge benefit," says Wass.

"The learning programme powered by the Innate software has caused a radical change in the provision of our training courses. Better learning experiences are now available to Abbey employees as a result", concludes Wass.