



# TRAINING NEEDS & RISK ASSESSMENT

## Evaluating and Building Your Training Program

The skills your employees need within your financial institution are rapidly changing. Few industries are as highly regulated as the financial services sector. With rapidly changing regulations and the acceleration of digital transformation, employees need to complete new tasks at a high speed while ensuring compliance and great customer service. However, according to Gartner, only 29% of your employees feel they have access to the right learning solutions when they need them.

**Your people are your most important resource.** How many monetary losses could be avoided with job specific training? How many customers could be handled more effectively with better communication skills?

"L&D provides relevant learning solutions right when I need them."

*Source: Gartner*

29% AGREE



# How Does Your Training Program Measure Up?

As your trusted training partner, OnCourse Learning provides a comprehensive training assessment of your financial institution's compliance and professional development education programs. The purpose of this training assessment is to help you identify gaps and develop a plan for your financial institution and provide a framework for developing the training programs your financial institution needs.

## The Training Needs & Risk Assessment is designed to provide:

- A consultative evaluation of your current training programs
- Data-driven insights into your job specific training gaps and how to close them
- A deeper understanding to how your training programs drive business goals, objectives and collaboration with management
- Methodology framework for creating flexible and systematic training programs

## 4 STEP DATA-DRIVEN APPROACH

The Training Needs and Risk Assessment takes a four-step data-driven approach to evaluating and building your training program.



## Ready to Take Your Institution-Wide Training to the Next Level?

To learn more about the Training Needs and Risk Assessment, please visit [OnCourseLearning.com/Training-Assessment](https://OnCourseLearning.com/Training-Assessment) or contact your Account Representative today.



### 01 Analyze Your Overall Training Program

We'll ask questions related to your current training programs. We'll also conduct a Loss/Risk Root Cause Analysis to better understand the financial impact training has on your institution.

### 02 Review Your Job Specific Training Program

Next, we'll learn more about your job specific training programs starting with your new hire orientation and onboarding. We'll also discuss the full breadth of programs across your institution, from the frontline to the boardroom, to gain a detailed view of what you could do better, what's getting the job done and what you do well.

### 03 Summary *Where are you now? Where do you want to go?*

Then, we will use three different tools to help you plan and identify strengths and weaknesses. We will analyze for risks, assess for a baseline score and assess what's needed and define goals.

### 04 Implement a Plan

During step four, you are now ready to define and implement a short-term and long-term plan. We'll suggest action steps and continue to review your training program needs to help you achieve your goals.