



Blended Learning Helps Sales Staff Become **FINANCIALLY KNOWLEDGEABLE**

Computer Associates leverages blend of e-learning and customized training to support sales in financial services industry.

By Kimberly Morton

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Computer Associates (CA), an information technology management software provider, is known for both its software and its expertise in unifying complex IT environments in a secure manner across large enterprises to achieve business results.

To continue the strong and consistent growth it had achieved through the years, CA decided to push deeper into vertical industry sectors, particularly financial services. This strategy presented new training challenges to a company deeply invested in professional development.

The breadth and complexity of the financial services market demanded that CA seek tools to bring its people up to speed quickly. Ultimately, CA found a solution in a program that deftly blends e-learning with customized, in-person learning—TowerGroup Financial Services Industry Training (FIT).

The company

Founded in 1976, CA is a global company with headquarters in the United States and 150 offices in more than 45 countries.

CA recognized long ago the importance of investing in its people throughout their careers with the company, and takes employee training seriously. Its internal learning management system (LMS) hosts online courses for employees and a variety of leadership programs.

This commitment is further illustrated in the C-level title of chief learning officer held by Bradley Samargya, who heads the CA training and development programs.

The challenge

CA has more than 5,300 associates spread across horizontal markets worldwide but recognized that to reach

its growth objectives, it would have to refocus its sales approach on industry verticals. The shift put the challenges of training in sharp focus.

The company started to build vertically focused sales teams, including several hundred employees working in the financial services arena. The majority of these employees came from software, hardware, or consulting industries, not financial services.

CA quickly realized that its people needed not only to speak the language of financial services, but also to understand the deeper challenges its clients are facing in the marketplace. To train them, CA needed to identify the business drivers that fuel technology-buying decisions in the financial industry, and to articulate and connect its own value proposition to the issues keeping C-level targets awake at night.

With such a large number of employees, CA quickly found that it needed more than a one-size-fits-all training approach for its associates focused in the financial services space.

The solution

After evaluating a number of training options, CA turned to an innovative education program created by Tower Group, a research and advisory services firm. Called "FIT," the program offers organizations a blended approach to training, leveraging a mix of online courses (e-learning), in-person sessions, ongoing access to resources to flexibly adapt to each organization's training preferences, and other benefits:

- **Easy implementation.** For participants, getting started was as simple as clicking a web link to connect to the hosted course on the TowerGroup servers.
- **Cost-effective delivery.** Direct access from the employee's desktop meant little lost productivity and no travel expenses.
- **Available 24/7.** The courses could be taken at any time, anywhere—a vital benefit for CA sales personnel on the road.

"We turned to TowerGroup for its techniques for training sales people quickly and efficiently," notes Mark

Bubar, worldwide vice president of sales financial services at CA. "Specifically we needed to better educate our sales teams on the deeper issues driving the financial services industry—getting them beyond the top line." And the team from TowerGroup delivered.

The process

Two years ago, CA started a pilot version of vertical financial services education with TowerGroup. A CA focus group of approximately 50 employees participated. The pilot included a pair of targeted online courses, followed by an instructor-led session in banking and payments.

The online courses included a "101" course on the basics of banking and payments and a "201" course reviewing the top business drivers behind the technology buying decisions made by major banks and other market players. Each course had progress checks between sections of course content to keep the learner engaged, and each ended with a larger test module.

The live, interactive training session, led by a TowerGroup instructor, dug deeper into the course content and reviewed the more complex industry information from the 201 banking and payments course. The analysts from TowerGroup have held senior executive positions in the financial services institutions that are CA's prime targets and therefore understood the mindset and needs of the line of business executives who ultimately make the kinds of purchase decisions that affect CA.

After attending the instructor-led session, CA associates were able to:

- ask relevant questions and discuss key challenges in the banking and payments sector of the financial industry vertical
- identify areas in business and IT in this sector
- identify key personnel and their areas of focus
- understand how to position the CA solution in terms of this financial industry sector
- target the CA solution to key challenges and issue specifics
- focus the CA solution on core areas of the operation.

CA sales associates were impressed with the industry content delivered by FIT in the online courses and instructor-led sessions and requested similar content for other sectors within the financial services industries.

By the second year, CA had expanded the financial services vertical education program to cover enterprise-wide training across multiple vertical industries, including insurance, securities, and investments, as well as banking and payments. This global training program has the same format as the pilot: e-learning followed by instructor-led sessions. Hosting the e-learning courses on its own internal LMS system allows CA to retain complete control over learner usage, reporting, and tracking. The firm has worked with TowerGroup to deliver instructor-led sessions with CA's top sales associates in North America and the Europe–Middle East–Africa region.

Among the lessons learned from the roll out of the program, CA identified the most critical for its success to be support from top management following proof of impact and results, effective collaboration between internal and external resources, and pilot programs executed with set deadlines, and well-defined next steps.

Result

CA's investment in financial services vertical training is paying off. Its sales associates have gained a much deeper understanding of the financial services industry. This financial industry-specific knowledge has allowed CA's associates to further engage with key decision makers within their targeted accounts and, as a result, shorten the sales cycle. This advantage has helped CA to further its transformation from a tactical product provider to a strategic partner.

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T+D is published by the American Society for Training and Development (ASTD)

010859.63250

