



Developing talent with digital learning to improve career development and reduce churn at Permanent TSB

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Result: Great user feedback with high engagement rates and high user return rates

ABOUT THE CLIENT

Permanent TSB Holdings Group is a significant provider of retail financial services in the Irish domestic banking market. It offers a broad range of retail banking products and financial services to its customers including current accounts, residential mortgages, term loans, credit cards and overdrafts as well as general insurance. It has over 1.1 million customers, and a staff of more than 2400 people across 77 branches.



DEVELOPING AND RETAINING TALENT IN A COMPETITIVE SECTOR

Permanent TSB implemented the SuccessFactors Learning Module in 2008 to support and develop their staff. As a regulated industry, it was important to ensure staff training was up to date in areas of compliance and the online learning system meant that all learning was tracked.

“However, we typically had low engagement with our Learning Management System as it was predominantly used for mandatory e-learning courses, and our staff didn’t see the benefit of completing both personal and management development learning,” says Valerie McCrory, HR Learning Specialist at Permanent TSB.

The HR team found that their people were learning in a different manner, going to Google to research how to do things, or relying on other online resources such as Wikipedia or thought leadership articles to supplement their online development. The issue was that many of these sources were not accredited or necessarily right for the business.

Permanent TSB faced another challenge – they were at risk of losing talent to their competitors. *“One of the reasons our leavers stated was the lack of career opportunity,”* explains McCrory.

In 2016, PTSB discussed the need to move their learning module into the cloud and approached SuccessFactors to see if there was anything they could offer us to support this initiative. SuccessFactors and TalenTeam advised that by implementing Foundation we would enhance our digital learning solution but allowing access from anywhere at any time. Foundation would also allow them to future-proof their offering for such time when other modules such as Performance and Goals would be implemented.

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BUILDING A DIGITALISED CAREER DEVELOPMENT SYSTEM

A major challenge for Permanent TSB was how to get the right information to a network of people who were widely dispersed around the country, and who could not take time out to attend a variety of courses. Making the learning appealing and easy to access was critical. That's when we started to engage with SuccessFactors on how to make things more mobile and digital,” explains McCrory.

WORKING WITH AN IMPLEMENTATION PARTNER

Permanent TSB had worked previously with SuccessFactors to implement the learning module, and SuccessFactors recommended that they bring in TalenTeam as their implementation partner given their deep expertise in financial services and knowledge of highly regulated environments. It was a fairly tight time-scale for implementation, but with careful planning, execution and good communication, the project ran smoothly.

“It was a real benefit to us, having TalenTeam to support us. They understood us, and financial institutions more generally. It was great to have somebody who had an understanding of our organisation and our infrastructure, as well as knowing the product inside and out,” says McCrory.

OVERCOMING TECHNICAL CHALLENGES

At first glance, the project appeared to be a straight forward implementation of the Foundation platform, linking to the existing LMS, and allowing for the implementation of adding additional HR processes in the future. The company already used Abintegro - a separate third-party career portal - and the project steering committee had a vision for how the new system would work, with seamless integration to the existing portal. In reality, this was a major challenge due to the security and technical issues that had to be solved before the two systems could read to each other. *“It was our scariest moment when we realised that our vision might not be technically achievable. But TalenTeam kept going until they delivered what we wanted,”* says McCrory.

ENHANCING USER EXPERIENCE

“Permanent TSB carries out an employee pulse check every 2 years - a group-wide company survey - and one of the things that's always highlighted is the need for better career development,” explains McCrory. This project to invest in the platform and learning come from the top down, with support from the CEO and the Executive committee, as there is now a clear focus to retain and nurture talent within the organisation.

The Foundation platform makes it possible to tailor the landing page and brings extended functionality, like user profiles and organisation charts. Users can easily click through to the career portal, without the need to login again, delivering a seamless user experience. *“It is easy to use and it is branded as Permanent TSB, so it is bespoke and our staff can see its specifically designed for their needs,”* says McCrory.

VALUING INTERNAL, AS WELL AS EXTERNAL, CUSTOMERS

Permanent TSB recognises that the needs and aspirations of their customers are changing. While the bank still operates a network of local branches they are also opening up more digital channels, such as mobile apps, online banking, and arranging branch interviews through an online booking system.

The move towards digitalisation, and e-learning, impacts on staff equally. *"We are an employee-facing company. Our people can see that there is real investment in training and career development, and that there is a great opportunity for them in this company. People realise that the platform is in direct response to their feedback,"* explains McCrory.

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THE BENEFITS

While it is too early to quantify the impact that the new system will have on attrition rates, initial results look promising.

Positive feedback from users – So far the feedback from users across the organisation has all been positive and staff like the look and feel of the new system.

High engagement rates – The system is available to all staff across the organisation – over 2600 in total – and to date over half the staff have logged into the system. Not only are they logging in, but they are coming back and completing activities. The average person completes 4-5 activities in a login.

A foundation for the future – The Foundation platform allows Permanent TSB to build on their system and provide a seamless employee experience across all HR processes. PTSB plans to implement Performance and Goals as the next step, which will provide greater transparency for managing teams and ensuring goals are aligned to business outcomes.

IMPACT ON PERMANENT TSB

"It was a key requirement for us that there was seamless integration, and that our internal customers didn't realise they were going into the cloud, or that there were actually two platforms. They had to be able to navigate between them easily," says McCrory.

The system has demonstrated that digital learning can meet all the business's regulatory requirements, whilst also supporting and developing their staff in an engaging manner.

"Having the people at TalenTeam - who really understood our infrastructure and our restrictions of being a financial institution - really helped. To have business experts that knew the product inside and out, that knew its constraints and how we could overcome them, how we could tailor things, that made all the difference." **Valerie McCrory**, HR Learning Specialist at Permanent TSB



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