

case study

Promina Group

Promina Group Tackles Tactical Compliance Challenges as Well as Essential Business Operations with Saba®

Solution Overview

Industry — Insurance and Financial Services

Challenge

Address immediate compliance requirements set forth in government legislation and support ongoing corporate programs that align with business objectives

Benefits

- Launched e-learning system in only six weeks with Saba Rapid Deployment Package
- Reduced costs compared to previous classroom training
- Freed human resources personnel to focus on other priorities
- Allowed Web-based access to e-learning for external agents, significantly cutting costs and time
- Delivered personalized and branded training quickly and easily at a fraction of the cost

Solution

Saba® Learning Suite
 Saba® Rapid Deployment Package
 Saba® Publisher
 Saba® Analytics

Promina Group is a specialist group of diverse Australian and New Zealand insurance and financial services companies, including AAMI, Australian Pensioners Insurance Agency (APIA), Shannons, Vero, Asteron and Tyndall. It is the second-largest insurance and financial services company in Australia and New Zealand, and a former subsidiary of Royal & Sun Alliance (RSA) Australia Holdings Limited. Promina was established in 1833 in Australia and in 1878 in New Zealand and, today, has more than 6,500 employees across 210 offices.

“ The Saba platform is regarded as an integral part of learning and development across the group. It is a case study in how to successfully move the human capital management paradigm from human resources to the business as a whole. ”

Andrew Brown, Manager People and Performance
 Promina Group

Legislation Drives Massive Compliance Initiative

With the enactment of Australia's Financial Services Reform Act (FSRA), Promina had two years to comply with stringent new regulations that included compliance training for about 350 employees in its general insurance group and about 700 employees at Asteron, Promina's financial services division. With the new ruling, organizations must demonstrate that employees and agents have the competencies, skills and knowledge required to sell a range of complex, regulated products and services. The FSRA also required that organizations maintain training records and keep development plans in place for all employees affected by the legislation.

Initially, Promina looked to external content vendors for content and knowledge management, but then determined it would be cheaper, quicker and simpler to develop and deploy the training content in-house. The next step was to find a technology provider to facilitate this strategy.

Saba Supports Tactical and Business Objectives

After evaluating a number of solutions, Promina identified Saba Learning Suite as best suited to meet both its strategic and tactical FSRA compliance needs. “For FSRA, time was of the essence. Since we needed to meet compliance requirements within 24 months, Saba’s Rapid Deployment Package offered an ideal solution. It allowed us to deploy the Saba Learning Suite in six weeks and move quickly toward meeting compliance requirements. Additionally, with Saba, we could give our external agents access to the system via the Internet, which meant significant cost and time savings,” explained Andrew Brown, manager People and Performance, who led the Saba assessment and subsequent Saba projects.

Another consideration that led Promina to select Saba Learning Suite was the platform’s sophisticated overall functionality, including strong reporting features and the ability to link staff competency assessments with development plans.

Robust E-Learning Content Created Without Programmers

After the Saba Learning platform was in place, Brown and his team created a 10-module compliance-training program using Saba Publisher. “One of Saba’s advantages that contributed to the speed with which we were able to develop, pilot and roll out the FSRA e-learning program was ease-of-use in terms of content development. The fact that our non-technical team was able pick up Saba Publisher and use it quickly to create e-learning materials for FSRA — and the fact that it gave us enough interactivity to deliver a high-quality end product — was great,” said Brown. “And the feedback from end users was very positive.”

Each learning module defined objectives and a multiple-choice assessment, designed by Brown and his team. The modules randomly tested knowledge and application of key topic areas required under the FSRA, with additional on-the-job assessment where necessary.

Ongoing Compliance Support

As Promina had no existing enterprise learning system, Saba combined an assortment of staff training information, held in other software programs, into one reporting system. The resulting reports provide a consolidated view of the staff or agents who have not yet completed training as well as ensure training is current by alerting people when they are required by law to renew their certifications.

“With Saba, we were able to complete the entire FSRA compliance training program within 12 months — half the time allowed under the new law — and we were the first general insurance company to achieve compliance on an in-house e-learning system,” said Brown. “In addition, by using Saba, we were able to significantly reduce costs as compared to previous training methods as well as realize additional savings from time freed up for human resources staff to focus on other priorities,” Brown said.

“Two years after deploying Saba Learning Suite for FSRA, it is used throughout Promina and provides a solid infrastructure for all of the learning and compliance needs within the company.”

Andrew Brown, Manager People and Performance
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Success Leads to Expanded Use

After the success of the FSRA project, Promina decided to implement the Saba Learning Suite across the entire organization for competency testing, development planning and other e-learning initiatives, including product training to enable sales readiness for various lines of business, privacy and trade practices training, compliance-related occupational health and safety training and learning analytics.

“Our success with the FSRA program helped us to demonstrate the power and capabilities of Saba as well as its ease-of-use – for both content creators and users. Since completing that project, more than 70 programs have been developed and these Saba-supported programs have been very successful and well received by our employees. To date, we’ve had more than 6,500 enrollments across the programs,” said Brown.

Among the programs supported by Saba Learning Suite is the learning plan, which is used for more than 350 employees from Australian Pensioners Insurance Agency (APIA) and 1,300 employees from Vero, both divisions of Promina. In APIA’s case, the planning function is linked to technical competencies of front-line staff and enables the identification of technical skill gaps. For Vero Australia, the Saba platform has been aligned to performance management processes that are undertaken formally on a half-yearly basis to ensure business alignment of activities undertaken as a result. Vero in Australia and New Zealand have also utilized the competency functionality to define and track technical underwriting competence, through an underwriting license process. This particular competence is central to sustained business performance.

Promina is also using Saba’s Prescriptive Learning for deploying custom-built training packages. “Saba lets us quickly and easily add e-learning programs and ad hoc tasks to an individual’s learning plan — automatically added when predefined conditions are met. For example, a training package could be created for a junior underwriter’s role and, when this role is added to an individual’s profile, this training package will automatically be added to this employee’s learning plan. This is a powerful and efficient way to allocate training,” explained Brown.

Simplified Data Collection and Analysis

A key enhancement to Promina’s Saba implementation was the installation of the Saba Analytics module, which simplifies the previously complicated and tedious task of collecting, collating and analyzing a large volume of data. Saba Analytics connects Promina’s employees and extended network of agents with business results, by correlating skills and competency acquisition with the achievement of core organizational objectives. “This is a critical measure of my team’s contribution to Promina’s overall success and Saba helps us gather and present this information efficiently and effectively,” said Brown.

High-Quality Content and Deployment — Quickly and Inexpensively

“We have achieved high-quality content development and deployment by coupling Saba Learning Suite with sound instructional design principles. We’ve also been able to provide excellent e-learning at a fraction of the cost normally associated with such development and delivered it quickly to employees in a personalized, branded format that is in line with Promina’s specialist-focused strategy,” Brown said.

Future Plans

Promina plans to use Saba Learning Suite to expand a recently launched induction program that will improve the time-to-competence of new employees. Linked to job profiles and learning plans, the program will help employees achieve learning goals and increase employee skills to create competitive advantage.

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Promina is also considering how it might use Saba to improve speed-to-competence, to thereby increase productivity and performance of employees as well as external agents and channel partners. Also planned is a pilot within APIA to create dynamic learning for a fast-paced contact-center environment and customer support initiatives in the Vero division.

Proven Results Make Saba Essential

“It was a risk to bring Saba Learning Suite, a completely new system, into Promina and rely on it entirely for such a time-sensitive and business-critical program as FSRA compliance,” said Brown. “But we were confident in Saba’s rapid deployment package and it was very clear what the solution’s capabilities were very early on.

“Two years after deploying Saba Learning Suite for FSRA, it is used throughout Promina and provides a solid infrastructure for all of the learning and compliance needs within the company. We have built on the early FSRA success in a logical fashion but, at the same time, have not lost momentum. As a result, the Saba platform is regarded as an integral part of the learning and development process across the group. It is a case study in how to successfully move the human capital management paradigm from human resources to the business as a whole,” said Brown.

“Saba Learning is extremely cost-effective for us and the return on investment is huge. It’s no longer a ‘nice-to-have.’ It’s essential,” concluded Brown.