

# Invigorate Your Compliance Training With Storytelling and Animation!

## Case Study: Wealth Management Compliance Training Solution

A traditional approach to eLearning often sees courses developed with a very formal approach – text heavy, minimal graphics or bright colors and lacking key elements and features that are known to truly engage learners.

This case study focuses on compliance training that incorporates storytelling and fun animation and demonstrates how together, these elements can transform the learning experience and really improve the quality of your training.

**Client:** A Global Financial Services Organization

### Background

In the increasingly regulated financial services industry, organizations have an ongoing need for **compliance training**. Our client requires training for each of its employees annually and favors redesigning its training programs every year to keep them looking fresh and new with up-to-date content.

### The Challenges

Management thought a new approach to training was in order to improve on the success of previous courses. The challenge was to come up with something new and innovative – something that would excite employees and engage with them in a way that previous training programs had not done and convince management and key stakeholders that a new, light-hearted approach would be the right one to take.

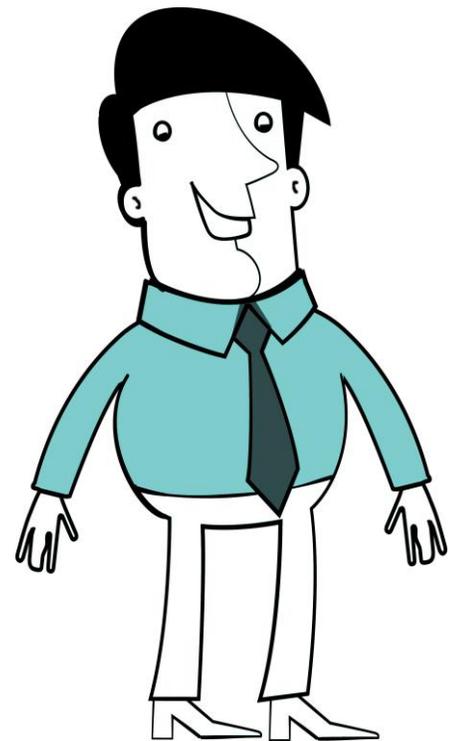
From a design perspective, the challenge was getting animation to work well with the client's chosen standard of technology for eLearning development, Articulate Storyline. Storyline does not generally work well with animation. It was decided that using Flash would be the best way to get the animation to work well with this course. This was, however, a key challenge for the lead graphic designer who worked on this project.

### Our Approach

Traditionally, formal eLearning courses had been developed for this client. On assessing the client's brief for this particular **compliance training** project, the decision was made to adopt a less formal, more light-hearted approach to a serious topic that would deliver key messages to learners.

### A Storytelling Style

Consultations and discovery workshops with our client resulted in a decision to develop a course that incorporates an animated, storytelling style and focuses on one central character. Learners follow the character throughout the course and learn about important compliance and regulation issues that affect their everyday jobs.



*'Charlie' – the central animated character*

The voiceover artist who was used in the course was chosen based on his engaging style, which was very suited to this particular course. Feedback from the client revealed that employees who took the training felt that the VO was one of the most engaging and entertaining features of the course. The VO helps to create a connection between the audience and the character 'Charlie.' The same voice was used for the character of Charlie's boss in this course, which seems to have worked quite well. Also, humorous sound effects were added throughout the course making it even more engaging and fun for the learner.

## Introducing 'Charlie' – the key character

'Charlie' is the central animated character in this course – a lovable financial advisor who teaches employees valuable compliance lessons as he stumbles through his working day. The course contains a range of scenarios for each compliance topic where Charlie makes mistakes that the audience learns from. Learning is provided via text delivery and interactive exercises and feedback.

'Charlie' and other characters he encounters are designed in what could be described as a newspaper style animation. It incorporates thought and speech bubbles around the characters to display key messages and give added effect. The course aligns well with the client's brand and identity as it incorporates the company's colors.

## Key Features

- Designed using Articulate Storyline (the standard eLearning development software of our client)
- Storytelling style with a mix of narration, chat, and thought bubbles and appealing sound effects
- Light-hearted and humorous theme
- Heavily animated with fun sound effects making a more enjoyable experience for learners

The course aims to make the learning experience as fun and engaging as possible for learners who traditionally were used to quite formal training. The simplicity of the design and the graphical elements really helped achieve this. Using graphics, animation, and storytelling as three key components in any eLearning often result in a very engaging learner experience. Feedback from our client's employees who have taken this training have confirmed that this wealth management course has definitely achieved this.

Choosing the right technology to develop an eLearning program and getting the mix of course design elements right can be difficult. But when you do get it right, the outcome can be very pleasing.

## Outcome

The outcome of the wealth management course was a comprehensive learning approach that has helped the client transform the style and effectiveness of its compliance training. Since its deployment in 2014, the course has been taken by over 16,000 of our client's employees. A survey was included at the end of the course to allow employees to give feedback on their experience with it. Over 2,300 people responded to the survey and the results were highly positive.

The client is continuing to provide us with feedback as it assesses the course performance. They have highlighted their satisfaction with the approach and style of the wealth management course.

Also, with many employees asking to see more of "poor Charlie", there are plans to develop similar training in future.

**80%** of survey respondents felt they were more engaged with this course than previous training they had taken

**92%** of respondents confirmed they thought that training that incorporated humour and entertainment was a better way to learn

**85%** of respondents confirmed they thought that incorporating interactive, scenario-based elements that compelled them to make decisions was very effective in helping them to learn