

Blending Training and Non-Training Solutions: New Broker Curriculum Case

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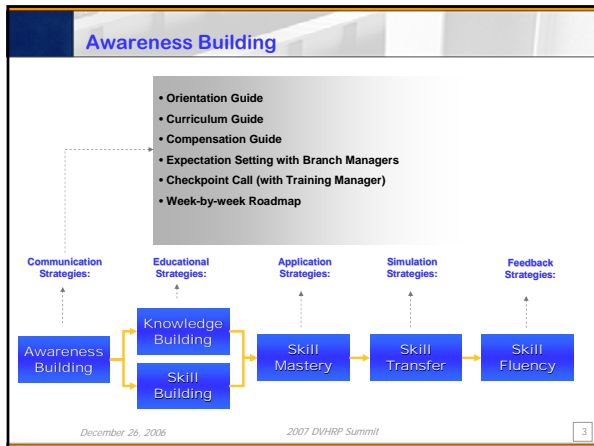
Client Situation & Goals

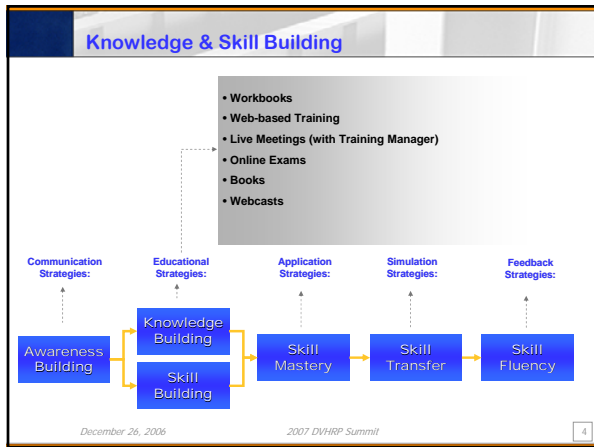
- Client:
 - Retail Brokerage Firm
 - Roughly 8,000 brokers nationwide
 - Offers a 2-Year New Hire Training Program
- Goal:
 - Improve Return on Training Investment
- Approach:
 - Achieve greater Skill Transfer
 - Reach Skill Fluency sooner
 - Spend less \$ on *unproven* talent (reduce year-1 expenses)

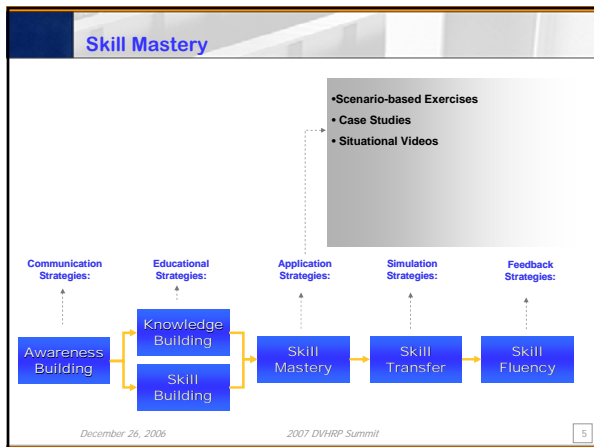
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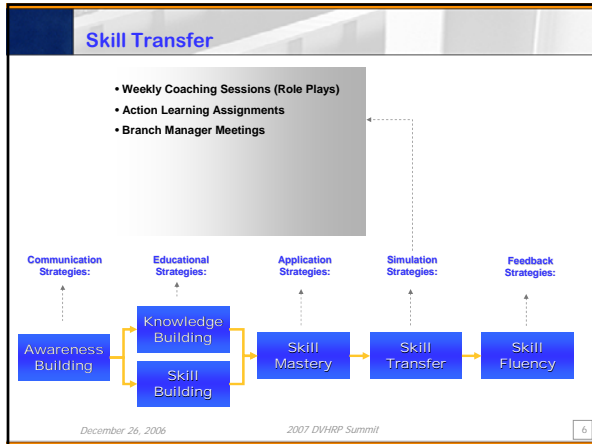
Learning as a Process

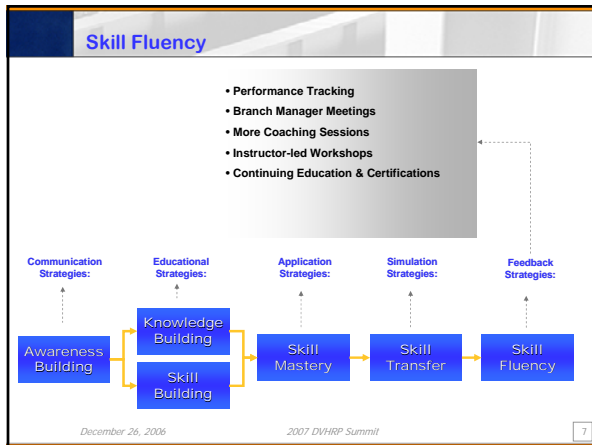
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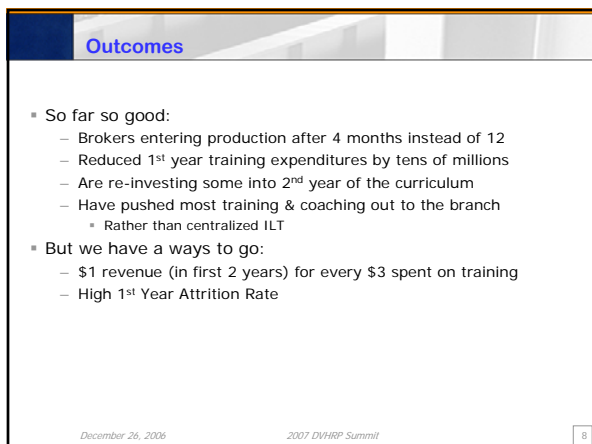












FYI Slides

The following are slides that we may or may not discuss during the panel session, but that may be helpful to you as a reference afterwards.

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Building Blocks of Performance

	Information <ul style="list-style-type: none"> • Clear expectations • Relevant feedback • Clear instructions 	Resources <ul style="list-style-type: none"> • Materials, tools • Time • Working conditions 	Incentives <ul style="list-style-type: none"> • Financial rewards • Recognition, praise • Positive work environment
	Knowledge <ul style="list-style-type: none"> • Know-how • Skills • Fluency 	Capacity <ul style="list-style-type: none"> • ...to learn • ...to perform • ...to improve 	Motivation <ul style="list-style-type: none"> • ...to learn • ...to perform • ...to improve

Based on Tom Gilbert's Performance Engineering Model, *Human Competence*, 1978

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Performance Solutions

Information <ul style="list-style-type: none"> •Clarify expectations •Provide feedback •Provide instructions 	Resources <ul style="list-style-type: none"> •Provide resources •Improve tools •Ergonomics 	Incentives <ul style="list-style-type: none"> •Incentivize Performance •Recognize Performance •Cultural change environment
Knowledge <ul style="list-style-type: none"> •Training •Practice 	Capacity <ul style="list-style-type: none"> •Simplify work •Development •Hire/Replace 	Motivation <ul style="list-style-type: none"> •Coach •Hold accountable •Hire/Replace

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