

Portfolio Case Study



The work behind the value

Scaling Enterprise Learning Operations Across Multiple Lines of Business

The Client

The client was a large national Canadian insurance and financial services organization with a complex advisor distribution network across Personal Insurance, Special Lines, Life, and Wealth.

At the time, I led the **Sales Distribution Enablement and Learning Division**, a centralized learning and enablement team responsible for supporting the development of Financial Advisors and their staff nationwide.

Our team supported the learning and readiness needs connected to the advisor role. This included product knowledge, sales capability, systems training, compliance requirements, service expectations, and change management implementation. In simple terms, if something impacted how advisors and their teams served clients, adopted change, used systems, sold solutions, or met business and compliance expectations, our team helped turn that need into practical learning and enablement support.

This work required more than building and delivering training. We acted as a bridge between business priorities and field readiness, helping ensure advisors and their staff had the clarity, confidence, tools, and support needed to perform in a complex and changing financial services environment.

The Problem

The learning function was asked to support a broader, more complex advisor-distribution business without additional resources.

The team was already responsible for the learning and enablement needs connected to Financial Advisors and their staff, including onboarding, product knowledge, sales capability, systems training, compliance learning, service expectations, and change implementation.

As the business evolved, responsibility for **Special Lines and Wealth** was added to the team's portfolio. These areas brought greater product complexity, higher compliance expectations, increased Errors and Omissions risk, and a stronger need for clear, consistent, and well-documented advisor training.

The challenge was not simply that more training was needed. The larger issue was that the learning operation needed to absorb greater complexity while maintaining advisor support, protecting quality, and improving visibility into performance, capacity, consistency, and risk.

There was also a transition challenge. Training and support already existed in various forms across the business, and new advisors still needed support as the work moved toward a more centralized enablement model. The team needed to understand what was already in place, what could be used immediately, what needed improvement, and where the biggest gaps existed.

Without a stronger operating model, there was a risk that learning demand would continue to grow without clear prioritization, that facilitator readiness would vary, that materials would become harder to maintain, and that training evidence would not be strong enough to support future review.

At its core, this was a **scale, risk, performance, and people challenge**: how to support more complex business areas with the same resources, while maintaining advisor readiness, delivery consistency, learner experience, and confidence in the quality of the learning strategy.

"She consistently demonstrated an exceptional ability to translate complex strategy into practical, high-impact learning solutions."

My Approach

I approached this as an **operating model and performance challenge**, not just a learning delivery challenge.

The work was not only about taking on more training. It was about understanding how the learning function needed to support a more complex advisor distribution business in a way that was scalable, consistent, measurable, and practical for the people doing the work.

I started by looking at the current state. I wanted to understand what was already happening, what was working, where the pressure points were showing up, and what needed more structure. This included reviewing existing performance measures, learner data, program activities, business expectations, and the learning supports previously used for Special Lines and Wealth.

I used a performance consulting lens to create a clearer picture of:

- **Who** needed support
- **What** they needed to know or do differently

- **Where** the gaps, risks, or pressure points were showing up
- **Why** the learning support mattered to the advisor role, the client experience, and the business

This helped create a baseline. The first goal was to maintain support and performance through the transition. From there, the goal was to build a more intentional enablement system that could improve over time.

A key part of my approach was keeping the **human lens** at the centre. The operating model needed to work for the business, but also for the advisors, their staff, the facilitators, the leaders, and the business partners involved. My focus was on how to get work done **for humans, by humans** — with enough structure to create consistency, but enough practicality to support real people in real roles.

Actions and Challenges

The main constraint was that the team's scope expanded to include Special Lines and Wealth without additional staff. These areas added more product complexity, higher compliance considerations, greater Errors and Omissions risk, and a stronger need for clear training documentation.

At the same time, new advisors still needed support. The work could not stop while the operating model was being improved.

To manage this, I reviewed the training and support that existed before the work moved to our team. This included existing materials, onboarding activities, product training, systems training, job aids, delivery practices, and informal supports. I inventoried what could be used immediately, what needed updating, and where the gaps were.

This allowed us to take an MVP approach instead of starting from scratch. We could maintain support for new advisors while building a stronger structure around the work.

I also worked more closely with the Special Lines and Wealth business units to clarify the performance and skill expectations connected to those areas. The focus was not just on what content needed to be covered, but on what advisors and their staff needed to apply correctly in their roles.

From there, the work focused on two connected priorities:

1. **Updating the learning materials** so they were clearer, more consistent, better aligned to business and compliance expectations, and strong enough to support advisor readiness.
2. **Upskilling the delivery team** so facilitators had the context, confidence, and business understanding needed to deliver the material effectively and consistently.

I also strengthened the structure around intake, prioritization, capacity planning, delivery standards, program maintenance, facilitator readiness, documentation, and measurement.

The challenge was balancing speed, quality, risk, and people capacity. We needed to keep learning moving, protect the advisor experience, support higher-risk business areas, and create a foundation that could be measured and improved over time.

This helped move the team from simply inheriting training work to building a more intentional enablement system — one that supported the business, protected consistency, and helped people feel better prepared to do the work.

"Through her leadership and insight, she has helped create strong buy-in and sustained momentum for change."

Outcome That Mattered

The learning function became more structured, scalable, and better positioned to support a broader advisor distribution business across Personal Insurance, Special Lines, Life, and Wealth.

The first outcome that mattered was continuity. During the transition, the current time to proficiency was maintained, which was important because new advisors and their staff still needed support as the work moved to a centralized enablement model. The goal was not to disrupt the learner experience while we improved the underlying structure.

Once the updated learning strategy was in place, the time to proficiency improved by **30%**. This was a meaningful result because it showed the work was not only being absorbed by the team, but the learning approach was becoming more effective for the business and for the people doing the work.

The transition of delivery ownership was also completed faster than planned. The team independently delivered the programs within 6 months, which was **3 months ahead of schedule**. This reflected the focus on upskilling the delivery team, clarifying expectations, strengthening materials, and giving facilitators the context they needed to deliver with confidence.

Within **12 months** of taking over Special Lines, program frequency was increased to provide more flexibility in start dates. This improved access to learning support and helped the business respond more effectively to onboarding and field readiness needs.

Quality was also protected through the change. Facilitator ratings remained strong at **4.5 out of 5**, indicating that learner experience and delivery quality were maintained as the team expanded its scope and took on more complex content.

The longer-term impact was seen in risk reduction. Within **18 months post-implementation**, Errors and Omissions payouts connected to “not trained properly” were reduced by **60%**. This reinforced the importance of designing learning that was clear, consistent, well-documented, and connected to correct application in the advisor role.

A quarterly review process was also added with Legal to assess current Errors and Omissions cases and identify opportunities to improve the learning strategy. These reviews helped inform delivery strategy, reinforcement activities, and updates to core programs. This created a more proactive connection between risk insights and learning design.

Overall, the work helped shift the function from a reactive training provider to a more disciplined national enablement centre. The team was able to maintain performance through transition, improve time to proficiency, increase delivery flexibility, protect facilitator quality, and contribute to a measurable reduction in training-related risk.

At the human level, this mattered because advisors and their staff had more consistent support. Facilitators had more confidence and clarity. Business partners had a stronger process for raising needs. Leaders had better visibility into readiness, quality, and risk.

In practical terms, the outcome was a stronger learning operation — one that could support more complexity with the same resources, improve advisor readiness, and create a more measurable connection between learning strategy, business performance, and risk reduction.