

# Portfolio Case Study



The work behind the value

## The Client or Team

The client was a large national Canadian insurance and financial services organization with a complex learning environment supporting advisor-facing roles, sales teams, service teams, leaders, facilitators, and operational partners.

At the time, I led a national learning and enablement function responsible for supporting onboarding, product knowledge, sales capability, systems training, compliance learning, service expectations, and business change. Many of these programs were traditionally delivered in classroom settings and were critical to advisors' and employees' readiness.

## The Problem

A rapid disruption required the organization to shift core learning programs from classroom delivery to virtual delivery while maintaining business continuity.

The challenge was not simply moving content online. These programs supported readiness for important roles, product knowledge, systems capability, compliance expectations, service standards, and business priorities. Learners still needed structure, guidance, interaction, and confidence. Facilitators still needed to deliver quality, even as they learned new tools and methods themselves.

There was also pressure to move quickly. The organization could not pause core learning for an extended redesign period. Programs needed to keep running, leaders needed reassurance, and learners needed to continue progressing through critical development pathways.

The risk was that a rushed conversion could reduce learner engagement, lead to inconsistent delivery, overwhelm facilitators, and weaken the quality of programs designed for in-person learning.

At its core, this was an **operating model, change management, and learner experience challenge**: how to protect business-critical learning while rapidly changing how the work was delivered.

*Carrie's creative facilitation style, continued push for innovation... allowing for things to get messy before they get organized, is outstanding*

# My Approach

I approached the shift to virtual delivery as a **learning operating model and change leadership challenge**, not just a classroom-to-online conversion.

The goal was to maintain business continuity while ensuring the learning still worked for the people involved: learners, facilitators, leaders, and the business. Programs needed to continue, but they also needed to remain engaging, credible, accessible, and connected to the outcomes they were designed to support.

I focused the strategy around five priorities:

## 1. Protect business-critical learning

I started by identifying which programs were most important to business continuity and learner progression. The focus was on moving the right programs first, stabilizing delivery, and then improving the model over time.

## 2. Preserve learning outcomes, not just content

The work was not about lifting classroom materials into a virtual platform. I focused on the question: *If this worked in the classroom, what would need to change for it to work in a virtual classroom?* This helped keep the focus on learner engagement, practice, discussion, coaching, and application.

## 3. Select technology that worked for the full audience

The virtual platform needed to support a strong learning experience and work for a national audience, including learners in remote areas with bandwidth limitations. The technology decision had to balance engagement, accessibility, reliability, and ease of use.

## 4. Build facilitator and learner readiness

Facilitators needed more than tool training. They needed support in translating their classroom strengths into a virtual environment. Learners also needed guidance on how to participate, engage, collaborate, and take ownership of their learning in a new format.

## 5. Create confidence in the model

There were natural concerns about whether virtual learning could be professional, engaging, and effective. Part of my role was helping leaders and facilitators move past assumptions about virtual delivery and focus on outcomes, structure, learner experience, and evidence of quality.

A key part of the approach was the introduction of the **technical producer role**. This role helped manage the virtual environment, support engagement, troubleshoot issues, and allow facilitators to focus on the learning conversation. It became an important part of protecting both the facilitator's confidence and the learner's experience.

Because the organization was already moving toward a more blended, outcome-based learning strategy, the transition also became an opportunity to strengthen the future model. When programs were relaunched, they were not only delivered in a new modality but were also better aligned with action-oriented outcomes, learner application, and greater flexibility in delivery.

Throughout the transition, I kept a human lens at the centre. Facilitators were being asked to bring their talent into a new environment. Learners were being asked to engage differently. Leaders needed reassurance. The business needed continuity.

My focus was to create enough structure, support, and direction so people could keep moving through the change with confidence.

## Challenges or Constraints

To move quickly without losing quality, I focused the work on the decisions, supports, and operating practices needed to keep learning moving.

Key actions included:

- **Prioritized the most business-critical programs** so the team knew what needed to move first and where continuity mattered most.
- **Evaluated virtual classroom technology** against learner experience, engagement needs, ease of use, and bandwidth realities across a national audience.
- **Set virtual delivery standards** for pacing, engagement, facilitation, learner participation, scheduling, and quality expectations.
- **Partnered with virtual learning experts** to help translate classroom activities into virtual experiences that still supported the same learning outcomes.
- **Upskilled facilitators** on how to bring their classroom strengths into a virtual environment, including presence, storytelling, coaching, discussion, and learner observation.
- **Introduced the technical producer role** to support platform management, engagement tools, troubleshooting, and learner participation so facilitators could stay focused on the learning.
- **Supported learner readiness** by creating clearer expectations for how to participate, collaborate, and engage in a virtual classroom.
- **Created communication and operating rhythms** to keep leaders, facilitators, learners, and business partners informed as the model shifted.
- **Monitored feedback and delivery quality** so the team could adjust quickly based on learner experience, facilitator input, engagement, and operational issues.

The main challenge was speed. The shift had to happen quickly, but the work still needed to protect program integrity, facilitator confidence, learner experience, and business continuity.

There were also mindset challenges. Some leaders and facilitators questioned whether virtual learning could be as effective or professional as classroom delivery. I helped reframe the conversation around outcomes, learner engagement, facilitation quality, and evidence of learning.

The work required a practical balance: move fast enough to keep the business supported, but thoughtfully enough to help people feel prepared, capable, and confident in a new way of learning and delivering.

*“Her guidance provided a clear and effective road map toward the project goals shared by our training [team].. This consistent support allowed me to deliver training authentically and confidently”*

# Outcomes

The organization sustained core learning delivery amid rapid disruption while protecting the learner experience, facilitator confidence, and business continuity.

The shift created more than a temporary virtual solution. It helped establish a stronger foundation for virtual and blended learning that could support the business beyond the immediate transition.

Key business outcomes included:

- **Maintained business-critical learning continuity during disruption**, allowing onboarding, product, systems, sales, compliance, and service programs to continue within four weeks of disruption.
- **Protected learner progression and readiness** by keeping required learning pathways active while the organization shifted from classroom to virtual delivery.
- **Preserved internal delivery capacity** by upskilling facilitators for virtual delivery and helping them translate their classroom strengths into a new environment.
- **Created a scalable virtual and blended delivery model** that could be reused for future onboarding, product launches, systems training, compliance programs, and change initiatives.
- **Reduced travel dependency and improved national access to learning**, contributing to an estimated **\$250,000 in travel expense savings** during the transition by reducing learner and facilitator travel.

Additional outcomes included:

- **The technical producer role was introduced** to support platform flow, troubleshooting, engagement tools, and learner participation.
- **Virtual delivery standards were established** to create greater consistency in pacing, engagement, learner support, and delivery quality.
- **Leaders gained confidence in virtual learning** as a credible, professional, and outcome-focused delivery model.
- **The transition accelerated the move toward blended, outcome-based learning**, helping relaunched programs focus more clearly on learner application and measurable outcomes.

At the human level, this mattered because facilitators could continue to bring their talent, presence, and care to the learning experience. Learners continued to receive structure and support. Leaders had more confidence that capability development could continue during disruption.

**In practical terms, this work helped the organization move from emergency virtual delivery to a more flexible blended learning model — one that protected business continuity, strengthened facilitator readiness, maintained learning quality, improved national access, and reduced travel-related costs.**

