

Case Study 3: Driving FinTech Adoption Through Targeted Training

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Client Overview

A major financial services firm introduced a **new digital banking platform** to enhance client experience and streamline operations. The success of this transformation relied on **rapid employee adoption** and **customer training** without disrupting daily operations.

Challenges

- Employees needed to master **new FinTech tools** quickly
- High regulatory compliance requirements
- Diverse user base requiring **multilingual training materials**
- Need for a scalable training model for ongoing product updates



Role-Based Training Design

Developed **modular, scenario-based training programs** for different roles, including customer service reps, financial advisors, and compliance teams.



Microlearning & Simulation

Introduced **interactive simulations** for real-world banking scenarios and created **bite-sized video tutorials** to reinforce learning.



Change Management Support

Guided leadership teams through the transition, reducing resistance and ensuring alignment with business objectives.

Results

92%

Employee Proficiency
within 60 days of launch

25%

Improved Customer Satisfaction
Scores increased significantly



Compliance Errors
Significant Reduction



Scalable Model
for continuous FinTech innovation rollouts

Key Services Delivered

FinTech Training Program Development

Compliance-Focused Instructional Design

Interactive Simulations & Microlearning

Change Management Consulting