Maximizing Training Investment with Reporting and Analytics

A New Self-Service Solution Enhances the Value of Training at Omega Performance

—Karen O’Leonard, Vice President, Benchmarking & Analytics Research
Bersin by Deloitte, Deloitte Consulting LLP

Omega Performance Corporation, a TwentyEighty company, is one of the leading providers of credit and business conversation training for financial institutions around the world. The company helps its clients differentiate and drive business growth by delivering high-impact training solutions through a unique blended-learning framework that integrates self-paced e-learning courses, live “Skills Application Labs,” coaching and mentoring programs, and what Omega Performance calls its “analytics reporting” solution.

While Omega Performance moved into the digital reporting realm long ago, many of its clients preferred to manage course data through an analog process that could add days to enrollment and results assessments. The organization’s new solution now gives employees at client companies the ability to self-register and self-enroll in courses, while also giving clients access to self-service, online reporting to track progress, measure success, and segment results. This solution has allowed Omega Performance to expand its offerings to a larger base of clients.

In this case study, we:

• Explain the challenges that precipitated the company’s decision to evolve its processes and solutions
• Examine how Omega Performance developed its new solution
• Explore how Omega Performance’s clients are able to use the new solution to improve productivity and decision-making

Copyright © 2015 Deloitte Development LLC. All rights reserved.
This material is licensed to NetDimensions for distribution only.
The Bersin WhatWorks® Membership Program

This document is part of the Bersin Research Library. Our research is provided exclusively to organizational members of the Bersin Research Program. Member organizations have access to an extensive library of learning and talent management related research. In addition, members also receive a variety of products and services to enable talent-related transformation within their organizations, including:

• **Research**—Access to an extensive selection of research reports, such as methodologies, process models and frameworks, and comprehensive industry studies and case studies.

• **Benchmarking**—These services cover a wide spectrum of HR and L&D metrics, customized by industry and company size.

• **Tools**—Comprehensive tools for HR and L&D professionals, including tools for benchmarking, vendor and system selection, program design, program implementation, change management, and measurement.

• **Analyst Support**—Via telephone or email, our advisory services are supported by expert industry analysts who conduct our research.

• **Strategic Advisory Services**—Expert support for custom-tailored projects.

• **Member Roundtables**—A place where you can connect with other peers and industry leaders to discuss and learn about the latest industry trends and leading practices.

• **IMPACT Conference: The Business of Talent**—Attendance at special sessions of our annual IMPACT conference.

• **Workshops**—Bersin analysts and advisors conduct onsite workshops on a wide range of topics to educate, inform, and inspire HR and L&D professionals and leaders.

For more information about our membership program, please visit us at www.bersin.com/membership.
Contents

Company Overview 4
Business Environment and Challenges 5
Omega Performance’s Blended-Learning Framework 6
  Bringing Reporting to the Next Level 8
  Putting Data into Action 9
  From the Client Perspective 11
Business Impact 12
Lessons Learned and Leading Practices 13
Next Steps 13
Conclusion 14
Appendix I: Topics for Discussion and Learning 15
  Ideas for Action 15
  Questions to Consider 15
Appendix II: Table of Figures 16
About Us 17
Company Overview

Founded in 1976, Omega Performance, a TwentyEighty company, is the banking industry leader in credit and business conversation training, offering high-impact training solutions to banks, credit unions, wealth management firms, and nonbank financial institutions worldwide. Using proven and time-tested strategies, the company helps lending institutions of all sizes develop and sustain strong credit cultures, make smart credit and risk management decisions, create profitable loan portfolios, and enhance their value propositions in a fiercely competitive marketplace.

Omega Performance is known across the financial industry for its blended-learning strategy and for delivering learning solutions that are practical, scalable, impactful, measurable, and consistent. The company built and tested its training methodology over a 40-year period, and while its online course offerings continue to expand, its growing line of innovative, facilitator-led, case-based Skills Application Labs bring reality into the classroom. In addition to its proprietary learning content, Omega Performance also provides coaching and mentoring programs to its clients, as well as its “analytics reporting” solution.

The company’s headquarters is in Arlington, Virginia, with additional locations in financial capitals around the world, including Mumbai, Singapore, and Sydney. Omega Performance is owned by TwentyEighty, a global provider of workforce performance solutions designed to help companies in the areas of leadership performance, sales performance, credit performance, and strategic execution.

Figure 1: Omega Performance at a Glance

- **Year Founded:** 1976
- **Staff (Including Employees and Consultants):** 65
- **Headquarters:** Arlington, Virginia
- **Office Locations:** United States, Australia, India, Singapore

*Source: Omega Performance, 2015.*
Omega Performance is known as a leading provider of credit and business conversation skills training for financial institutions. The company’s clients need to ensure their employees—such as lenders, business bankers, credit analysts, underwriters, relationship managers, branch managers, personal bankers, loan operations managers, and customer service representatives—have the knowledge to spot risky credit scenarios and lend money effectively.

Omega Performance’s blended-learning framework includes a highly integrated combination of e-learning courses, Skills Application Labs, and coaching programs. The company has been a pioneer in developing e-learning curriculum and digital reporting features, but some of its traditional clients remain more comfortable operating in a paper-based reporting environment. Indeed, financial industry clients are particularly sensitive and protective of employee data, which adds to their reluctance to embrace online reporting solutions.

For its part, Omega Performance helps clients become more comfortable with using self-service, online, secure reporting tools. And with good reason: The company found that the manual processes used by clients were slowing down the pace and flexibility of these same clients’ business decisions. For example, Omega Performance’s preexisting enrollment and reporting framework requires that courses be taken on a predetermined schedule. If a client wants to enroll additional employees in a particular course, update an employee’s information, examine an employee’s transcript, or run a report, that client must inform Omega Performance, which in turn must make changes to its preexisting reporting templates and schedules. A single change request can take up to three days to process. Meanwhile, additional requests for changes may create even further delays.

With support from the company’s senior leaders, the Omega Performance learning technology team was charged with developing and implementing an online solution with a self-service option to improve clients’ administration, reporting, and benchmarking abilities, as well as help the company win new business.

On the self-service administration and reporting front, the new solution would:

- Give client administrators access to the status of their participants’ information and programs
- Enable clients to easily monitor employee progress and keep learners on track
- Provide clients with rankings and group summaries to measure the progress of business units
• Quickly deliver results to the business by reducing reporting time through automated scheduling

• Allow clients to map test data back to business-unit and individual performance

On the benchmarking side, the new solution would:

• Enable clients to measure their performance against the competition across any standard Omega Performance e-learning course

• Validate clients’ investments in training by measuring organizational improvement against preset goals

In essence, the solution would empower Omega Performance’s clients to make near real-time business decisions based on course results.

Omega Performance’s Blended-Learning Framework

Omega Performance’s training offerings provide clients with highly interactive learning, including e-learning courses, facilitator-led Skills Application Labs, and in-depth coaching and mentoring programs. The content is anchored by 19 e-learning courses, which span more than 160 hours of instruction. Depending on the course, the e-learning experience is enhanced by multimedia animations, embedded quizzes, worksheets, and easy-to-access glossaries. The courses are grouped into three primary areas: core credit skills, conversation skills, and coaching skills (see Figure 2).

**Figure 2: Omega Performance’s E-Learning Courses**

<table>
<thead>
<tr>
<th>Core Credit Skills</th>
<th>Conversation Skills</th>
<th>Coaching Skills</th>
</tr>
</thead>
<tbody>
<tr>
<td>Building Small Business Acumen</td>
<td>Advancing Customer Connections</td>
<td>Coach the Coach</td>
</tr>
<tr>
<td>Business Lending Fundamentals</td>
<td>Building Customer Connections</td>
<td>Coaching for Quality Business</td>
</tr>
<tr>
<td>Commercial Loans to Business</td>
<td>Collaborative Business Conversations</td>
<td>Credit Coaching &amp; Mentoring</td>
</tr>
<tr>
<td>Commercial Loans to Small Business</td>
<td>Collaborative Small Business Conversations</td>
<td>Customer Experience Coaching</td>
</tr>
<tr>
<td>Commercial Real Estate Lending</td>
<td>Creating Customer Connections</td>
<td>Scorecard Coaching</td>
</tr>
<tr>
<td>Consumer Lending</td>
<td>High-Impact Prospecting &amp; Networking</td>
<td></td>
</tr>
<tr>
<td>Financial Accounting for Lenders</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Understanding Personal Cash Flow</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Each course also includes modular pretests and posttests that allow business leaders and learning professionals to recognize employees’ prior knowledge, as well as newly acquired proficiencies and expertise; track employee progress; and selectively advance high-performing employees to more advanced learning regimens.

The learning and reporting process starts with companies offering courses to their employees. One example is the “Commercial Loans to Business” course, which takes 25 to 30 hours to complete. Employees typically take the pretests for each module. If they fail the pretest, employees then study the content for the module and take the posttest. Employees need to pass all the modules to pass the course. Omega Performance provides executives with both summary and detailed data about their employees’ progress, allowing business leaders to pinpoint employees who may need additional education or who may benefit from more advanced training.

At many companies, employees who exceed a high score on a posttest—typically 80 percent proficiency—are invited to participate in interactive Skills Application Labs. During these facilitator-led training events, employees become partners in learning, teaching each other the course content based on knowledge shared from their own backgrounds and experiences. These labs are built around real-world case studies that describe challenging business scenarios. Employees must make a number of critical business decisions—at times without 100 percent of the necessary information available. The facilitator’s role is not to lecture or provide information for memorization, but rather to serve as a guide and empower employees to ask the right questions so that proper analysis and decision-making can occur.

When it comes to offering such blended-learning experiences, Omega Performance is a pioneer; however, without the addition of a self-service solution, many clients lacked timely access to the status and results of employee learning. Historically, detailed reports on test completion or results were generated by Omega Performance, and these reports were run on a set schedule. Client-requested changes to an existing reporting framework could lead to delays, as such changes required manual intervention to implement. Relying on Omega Performance to deliver test scores and other data also meant that business and learning executives were not able to make rapid decisions or conveniently assign further learning tasks in a timely way to cement core concepts. Because of these limitations, clients were not able to fully maximize the benefits of Omega Performance’s solutions.
Bringing Reporting to the Next Level

In 2012 (see Figure 3 for full timeline), the company’s director of learning technology began investigating ways to improve the e-learning platform’s flexibility and expand client access to near real-time reporting data. The director concluded the company required a completely new technology to support this type of client-centered, self-service reporting strategy, but he also needed a partner that could help him deliver the right solution, and he actively scouted several options.

At a user conference that same year, the director approached a representative from NetDimensions, the company’s learning management system (LMS) provider. Coincidentally, NetDimensions was actively expanding its own analytics and reporting offerings, and the executives from the two companies quickly began discussing options.

Shortly thereafter, the director presented a list of requirements, a conceptual design, and mock-ups of the solution to NetDimensions. The solution had to be able to deliver several real-time data points, including who was taking the courses, how they fared on tests, and where they stood in the overall training process. These requirements also included:

- A near real-time chart showing each employee’s testing progress and pass / fail status
- An accounting of modular course pretest and posttest results
- An analysis of total time required by individual employees to complete tests and online content
- A relative ranking of employees in any given course to identify high and low achievers
- The ability for clients to compare their results against global benchmark scores for standard courses

In 2013, Omega Performance’s learning technology team began working directly with NetDimensions to implement a solution based on “NetDimensions Analytics,” the learning and talent analytics application that is a part of NetDimensions Talent Suite. These early steps included developing a client-access mechanism, robust security to guarantee the safety of client data, and a shared-reporting feature to allow clients quick access to data.

At the start of the third quarter of 2013, Omega Performance hired an outside software developer to create initial reports using an early version of the system. The developer worked full time on the project for a period of six weeks between July and August of 2013, and then worked on an as-needed basis over the next eight months while Omega Performance’s learning technology team put the software through a series of tests and client-based pilots.
Putting Data into Action

By mid-2014, Omega Performance began rolling out its new solution to select clients, including some of its larger U.S.-based clients. While the company’s target audience for the new solution—primarily learning professionals at client companies—already had reporting options, the new solution expanded this capability and put it in the hands of clients.

Today, Omega Performance’s clients can almost instantly measure the success of training modules and compare results for different internal groups. They can also identify areas in which employees are having difficulty. Clients can select from over 20 reports depending on which Omega Performance products they are using and how they would like the data presented—in summary or detail form.
Figure 4 presents a blinded model (one with actual participant names disguised) of a typical report available to learning executives at client companies. The report shows the name of the course—“Financial Accounting for Lenders”—and a list of participants. The data reported includes:

- Column D: The module's title within the course
- Column E: Whether participants passed the module
- Column F: The highest module score
- Column G: Total module time taken by the participant: includes pretest, content, and posttest times
- Column H: Scores on the module's pretest
- Column L: Highest score on the module's posttest
- Column N: Number of posttest attempts for a module

Learning executives can then sort this data in multiple ways. For example, they can search for the amount of time it takes employees to complete a module and then see if there is a correlation between that duration time and pass / fail test results. They can also view data that indicates further action is needed—such as employees who have not taken the module—allowing for timely follow up.

By drilling down into the report, learning executives can further analyze their employees' success within a specific course. In the simulated example in Figure 5, an executive can see how the participant performed on seven different modules in the course, as well as compare employees' test scores before and after participating in the learning module, allowing them to see instances in which an employee's score improved dramatically after taking the module.
From the Client Perspective

One of the early adopters of Omega Performance’s new solution is a highly diversified financial institution with business in commercial lending, consumer finance, and real estate investment. Among the Omega Performance courses the client uses to train its staff are “Financial Accounting for Lenders” and “Commercial Loans to Business.” Learning professionals at this company use the new solution to immediately share course results with business executives—saving time and increasing responsiveness to business needs.

The learning team is also experimenting with using the analytics and reporting functionality to correlate test results to employees’ business performance. For example, in the case of the client mentioned previously, one of Omega Performance’s business managers worked with the company’s learning executives to see if they could identify a correlation between higher scores and an increase in sales volume. The executives created different pools of employees based on pretest results. After the employees completed the posttest, the learning executives used the solution to segment employees into groups. This included a group that improved their scores substantially and one that did not. While this was an early study and the sample size was relatively small, the learning and business executives saw a clear correlation between improved financial acumen and improved sales volume.
“It confirmed the business leader’s belief that the training was working.”

—Learning Executive, Omega Performance Client Company

This same client also uses Omega Performance learning solutions as team-building exercises to refresh skills around lending processes. By having analysis and results instantly available after a course, learning executives are able to assign follow-up exercises to cement the knowledge that was gained. For example, the top-performing teams in a recent training exercise competed in a contest in which they explained different financial products to potential customers. The remaining teams were given a separate task of preparing a 10-minute presentation on business risks. This type of immediate posttraining response was not feasible before the analytics reporting solution enabled learning professionals to segment their teams by results.

**Business Impact**

Omega Performance’s on-demand reporting solution is a powerful tool in the hands of its clients. As of 2015, all of the company’s clients now have the online self-service “analytics reporting” solution enabled. Further, approximately 25 percent of clients are actively using the self-service option, and adoption is increasing rapidly.

The introduction of the solution has positively impacted Omega Performance’s business outlook, with executives reporting that it has contributed to an increase in client satisfaction and sales. The solution has also played a major role in differentiating Omega Performance’s market offering, with an estimated 25 to 35 percent of new business attributed in part to the reporting solution’s robust capabilities and cost-savings associated with efficient access to critical training performance data.

> “By empowering our clients with reliable, on-demand training data, we are able to partner with them to develop high-impact training programs that work for their unique training objectives. What we are hearing from our team and our clients is that this blended-learning framework, powered by near real-time analytics, gives us a distinct advantage when we are competing for business.”

—Director of Learning Technology, Omega Performance

For Omega Performance’s clients that use the new self-service reporting option, requests to change the frequency of scheduled reports, the recipients of reports, or to stop reports have been greatly reduced.
Lessons Learned and Leading Practices

• **Begin with the end in mind.** Mock up tables, charts, and graphics in a spreadsheet application before hiring a software developer. Get input and sign off, where required, from internal and external stakeholders.

• **Leverage outside resources.** Omega Performance hired an experienced software developer to help with execution during implementation. This developer was able to focus solely on the project on a full-time basis for six weeks, freeing Omega Performance’s learning technology team to work on higher-level issues.

• **Roll out new solutions in phases.** Omega Performance piloted its new solution with an increasing pool of clients and then received feedback to ensure it created a solution that clients could fully leverage.

• **Figure out your requirements.** One reason that Omega Performance was able to have an early version of the solution available in such a short period of time was that it created a detailed and comprehensive list of the requirements and functionality needed for its reporting tool.

• **Search for a solution partner that is aligned with your needs.** The director of learning technology at Omega Performance knew the company needed a new tool to support its self-service reporting strategy, as well as a partner to help deliver the right solution. He scouted several options before settling on the current solution provider.

• **Empower a team, add resources if necessary, and let them get to work.** The learning technology team at Omega Performance could not develop and implement the solution by itself. In addition to partnering with a solution provider, the team hired an outside consultant to bridge the gap.

Next Steps

By the end of the first quarter of 2015, Omega Performance had migrated all of its clients from the legacy reporting system to the new solution, which enables the company to provide different analysis and reporting options to its clients depending on their requirements. The company continues to reach out to clients for feedback and further improvements. Omega Performance’s learning technology team is now actively at work improving the user experience, fine-tuning the solution, and creating more compelling visual representations of data (as opposed to traditional spreadsheet-based results).
In 2015, Omega Performance will begin a campaign to offer unlimited-use licenses—a feature that was not practically feasible before the new solution. Executives believe the analytics reporting solution will also be an essential component to the company's success as it begins offering mobile solutions.

Conclusion

In 2013, as part of Omega Performance’s ongoing role in providing cutting-edge blended-learning solutions, the company sought to empower its financial industry clients with an on-demand, self-service analytics reporting solution. To achieve this goal, the company partnered with solution provider NetDimensions. The new solution gives clients the ability to offer Omega Performance’s courses to as many of their employees as required—all at a moment’s notice and on a self-service basis.

Another major advantage of the solution is that learning executives at Omega Performance’s clients are now able to make instant assessments of employees’ performance in each course. The solution allows executives a wide range of information, including test scores before and after training modules, how many modules employees have completed, and how long it takes employees to complete modules. If a subset of employees is underperforming—or excelling—compared to peer groups, learning executives can immediately share that information with managers and business unit leaders.

As Omega Performance continues to develop pioneering blended-learning solutions for its clients, its new solution will prove to be an essential component of its ongoing success.
Appendix I: Topics for Discussion and Learning

The following sections will provide you with considerations for sharing and implementing the leading practices highlighted in this report.

Ideas for Action

Below is a list of actions to help implement the key practices highlighted in this report:

• **Analyze how your team is spending its time with data reporting.** Omega Performance knew from its own analysis that they were devoting too much time to handling simple data requests that could be automated.

• **Start reaching out to potential partners and solution providers.** Omega Performance’s executive team is small, so implementation of the new solution required the help of a partner and a dedicated consultant.

• **Canvas your clients and team for ideas.** While Omega Performance’s learning technology team knew it could improve its reporting process, it also reached out to internal collaborators in sales and marketing as well as clients in order to identify requirements for its new solution.

Questions to Consider

Below is a list of discussion questions to facilitate implementation of an automated reporting solution:

• Is your in-house data team processing information that could be done more easily—and more efficiently—at the client end of the business?

• Does your organization have the know-how and financial resources to manage the development and implementation of a reporting and analytics solution?

• Are you able to make a business case, with potential upside, for implementing a new solution? For example, what problems would the new solution solve, and how will it impact the business?
Appendix II: Table of Figures

**Figure 1:** Omega Performance at a Glance  
**Figure 2:** Omega Performance’s E-Learning Courses  
**Figure 3:** Omega Performance Timeline to Advanced Reporting  
**Figure 4:** Report for the “Financial Accounting for Lenders” Course  
**Figure 5:** Test Scores for the “Financial Accounting for Lenders” Course
Bersin by Deloitte delivers research-based people strategies designed to help leaders and their organizations in their efforts to deliver exceptional business performance. Our WhatWorks® membership gives FORTUNE 1000 and Global 2000 HR professionals the information and tools they need to design and implement leading practice solutions, benchmark against others, develop their staff, and select and implement systems. A piece of Bersin by Deloitte research is downloaded on average approximately every minute during the business day. More than 5,000 organizations worldwide use our research and consulting to guide their HR, talent, and learning strategies.


This publication contains general information only and Deloitte is not, by means of this publication, rendering accounting, business, financial, investment, legal, tax, or other professional advice or services. This publication is not a substitute for such professional advice or services, nor should it be used as a basis for any decision or action that may affect your business. Before making any decision or taking any action that may affect your business, you should consult a qualified professional advisor. Deloitte shall not be responsible for any loss sustained by any person who relies on this publication.

Copyright © 2015 Deloitte Development LLC. All rights reserved.