

# Global Program

## Case Study

One of Wall Street's most prestigious investment banks had previously used another provider to train their annual intake of over 400 analysts - all in one room. This approach was cumbersome, and created a range of issues, including participants in the back being unable to hear well, and trainers being unable to effectively spend time with individuals. Engagement in the program was underwhelming. Financial Edge was brought in as a replacement, and was tasked with delivering a more innovative solution to prepare the bank's new analysts.

### CLIENT

**Elite investment bank (top 2)**

### PROGRAM

**New analyst entry training program**

### LOCATION

**USA, UK, India, and Hong Kong**

### PARTICIPANTS

**430+ new analysts**

### INSTRUCTORS

**12 full time instructors  
+6 teaching assistants**

Lead instructor:



**Gerard Kelly**

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EX-ERNST & YOUNG

## 1. The Challenges



### Scope

Instead of running one training, the client wanted to run multiple simultaneous trainings across 10 different classrooms, split across the US, UK, India and Hong Kong.



### Consistency

This presented several interesting challenges, such as how to ensure the delivery of identical content across all trainings, how to ensure all instructors were proficient with using (and teaching) the bank's internal models, and how to deliver effectively across multiple time zones.



### Competition

Another challenge was the pedigree of the bank's new analysts - most of them were already quite experienced, and they needed more than just basics. The client wanted the intake of analysts to be the best on Wall Street, and wanted a custom program that challenged the cohort to be better informed and prepared than the competitions' cohorts.

## 2. The Solution

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### Delegation

Meeting the client's expectations for this program required the alignment of many moving parts. The key to running the training program successfully started with simultaneous delivery across 10 classrooms. This meant many trainers spread across the world, rather than a small number of trainers in one big classroom. Financial Edge has a deep faculty of highly experienced trainers, so we were able to provide 12 trainers and 6 teaching assistants – 18 staff in total, with 11 in the US, 3 in the UK, 1 in India and 3 in Hong Kong.



### Bespoke, then Standardized

The trainers all spent weeks studying the client's internal models to be able to teach them confidently and accurately. As it was imperative that all trainers delivered the same training across time zones, steps were also taken to ensure that the instruction and delivery was standardised. This meant rigorous training and alignment of the 12 full time trainers across 10 classrooms.



### Custom eLearning

Lastly, as the new analysts were already experienced, we created custom eLearning to be completed as homework between training days. This was delivered in the same format as the adaptive pre-learning set in advance of the course, using self-paced, on-demand video playlists.



#### STAGE 1

**Adaptive pre-learning (digital, asynchronous), focus on accounting fundamentals.**



#### STAGE 2

**Ten-day instructor-led classroom learning supported with digital learning tools, delivered simultaneously across 10 classrooms in four countries.**



#### STAGE 3

**Custom eLearning built for internal models (IB division, FICC Fixed Income, Currency and Commodities).**

# 3. The Impact

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## Exceed Expectations

As is to be expected of a training program for one of the world's top banks, this program was designed to be challenging, and pushed the analysts to learn more than they would have expected possible.



## Desk-ready

With our instruction techniques for improving productivity and flattening the forgetting curve, the cohort were performing at a much higher level than they expected they could after just two weeks of training, and were ready to hit the desk, confident and prepared for their new roles.

# Trusted by Wall Street's Top Investment Banks

There's a reason we're trusted to teach Wall Street's best analysts. With instructors from J.P. Morgan, Goldman Sachs, Barclays, and other bulge bracket heavyweights, we deliver an unparalleled learning experience.

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