

# Custom eLearning

## Case Study

Financial Edge was approached by one of the world's largest asset management firms for support building a custom eLearning solution. They had previously sought support from another vendor to create the learning content, and a separate agency to aid with the production and post-production of the content. However the combined cost was prohibitively high.

### CLIENT

**Elite asset management firm  
(a world leader in AUM)**

### PROGRAM

**Custom eLearning for top  
asset management firm**

### PARTICIPANTS

**19,000+ staff**

### INSTRUCTORS

**3 subject matter experts**

Lead instructor:



**Andrew Jones**

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EX-STANDARD BANK

## 1. The Challenges



### Wide Scope

The client needed a huge amount of custom eLearning created for its 19,000+ employees to access. This included onboarding content to upskill new hires and to facilitate cross-functional understanding, for example, allowing employees from the legal department to better understand how fund managers make decisions, white-labelled learning content specific to department roles and functions (such as internal strategies for investment management), and explanations of broader business roles and responsibilities (such as communicating the work that the private markets division done to the wider firm).



### Considerable Cost

The second challenge was ensuring that the solution was affordable – given that such a large amount of content was being developed, and all of it was bespoke to the client and based on internal models and strategies, no other provider was able to deliver without bringing in external support from content production agencies (which would have inevitably increased the price dramatically).

## 2. The Solution



### Expert Perspective

The most important factor to get right was ensuring our instructors were experts on the client-specific, internal models, data, strategies and processes so we could create content that accurately reflected the client's perspective. We started by engaging in a detailed collaborative planning process to understand the client's needs as deeply as possible, and to extract client-specific content to create truly tailored learning documentation.



### Collaboration

Three Financial Edge experts, all with extensive experience working in some of the world's top finance firms, developed the eLearning library content in this ongoing collaborative process with the client. We ran weekly meetings to review progress and iterate on any content that needed additional detail. The client provided the framework for what to include and internal collateral examples, and we built the eLearning content with a combination of specific internal requirements and our fundamental technical knowledge.



### Bespoke-built

The client's eLearning library is the only place on earth with this specific information – not a single article or video was generic or templated, everything was built from the ground up exactly as the client requested. Because Financial Edge has a fully-fledged content team in-house, we were able to efficiently produce the learning content alongside the instructors, making the review and implementation process painless.



#### STAGE 1

**Custom-built learning library of bespoke eLearning content.**



#### STAGE 2

**Onboarding content, learning material, internal models and strategies.**



#### STAGE 3

**3 projects: Investment fundamentals, index investing, private markets**

LEAD INSTRUCTOR



## 3. The Impact

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### Set the New Standard

After delivery of the first project, the client was so impressed that two further projects were scoped. New hires have fleshed-out onboarding content, inter-departmental communication and understanding was improved through deep reference material, and on-demand sophisticated learning content is available to any of the firm's 19,000 employees to check their work, flatten the forgetting curve, and further sharpen their skills.

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