



CASE STUDY

ACCELERATED USER ONBOARDING AT WESTPAC BANKING CORPORATION

ABOUT CLIENT

Westpac Banking Corporation is one of the world's largest financial institutions, founded in 1817, headquartered in Australia. With its presence across the globe, Westpac provides a broad range of banking and financial services including institutional banking, customer, business and wealth management services to its customer base.

NEED FOR DIGITAL TRANSFORMATION

As part of a larger strategic plan, Westpac was required to revamp and strengthen its technology environment. Thus, kicking-off a critical digital transformation journey.

- Multi-billion IT project - One of the largest funded projects in the history of Australia's banking industry.
- The IT transformation journey led to replacing multiple legacy HR applications and financial systems with new applications.

Business Challenges

Digital transformation of such an immense nature is frequently difficult for employees and can lead to slower user adoption. These inevitable challenges presented a threat to Westpac's ability to quickly gain value from their billions of IT spend.

Accelerate Digital Adoption at scale

As a part of their IT transformation journey, Westpac rolled out a brand new banking platform to thousands of employees including lenders, credit managers, and assessors. The platform was designed to automate and streamline an end-to-end process for a loan, from start to finish. The most challenging problem for the bank was to quickly close loan applications to their customers. They needed to roll each application component to their employees without spending time and energy training, documenting, and organizing workshops. Westpac also considered how they can transfer knowledge from subject matter experts to new hires and colleagues in a scalable manner.

Enable Learning in the "Flow of Work"

Typically with any large project of a large scale as this one, it requires an incredible amount of training and support from SMEs across the business. And, there was no guarantee that employees would retain knowledge after the training sessions. Westpac realized that users who had access to support in the "flow of work," were more likely to be more proficient within the system, and actually adopt the digital tool, compared to those who were expected to only remember training sessions.

The above business challenges required Westpac to look for an in-app training and digital adoption platform to enable contextual guided learning, or Learning in the “Flow of Work” at scale. MyGuide offers this exact experience to digital users.

Achieve Human Capital Efficiency

Westpac’s structure is incredibly agile and requires resources to jump across various projects. Systems, processes, and structure can vary as employees enter new spaces and it requires them to quickly learn the inner workings of an application, business process, workflow or transaction. This presents a unique challenge of training employees on new systems to achieve desired efficiency and quick onboarding for Westpac employees. It’s important to think about onboarding as a use case for both the employees themselves, as well as the applications they are expected to learn and use.

MYGUIDE SOLUTION

In order to overcome the challenges of faster onboarding, enable digital learning, boost knowledge sharing between employees and increase productivity, Westpac uses MyGuide. This is accomplished through a self-serve model where content is “on-demand” and conveniently delivered inside core applications in order to accelerate the digital adoption of new applications used globally.

MyGuide drives engagement and in-app support to ensure Westpac’s human capital and internal tacit knowledge is shared across the organizations without the need for hands-on training or IT support. This allows experts at Westpac to make valuable contributions to internal processes so that best practices are well-known and consistently practiced.

User Onboarding

MyGuide provides step-by-step guidance as an overlay to Westpac application with audio/video in native language. MyGuide enables trainers to easily create multiple interactive on-screen guides that allows users to quickly and accurately complete many complex tasks. This core functionality is known as “GuideMe.”

Content that is created as a guide can also be made available as a PDF, PPT, DOC, GIF, and video. This is called “ShowMe.”

Workflow Automation

In addition to being learned, guides can also be automated. This removes any potential for human error while performing a task, while also allowing users to spend their time on other meaningful tasks. This is called “DoIt-ForMe.” called “ShowMe.”

Content Accessibility

Next, MyGuide gives users the flexibility to access in-app guides across web browsers so that they can access content on the go, anywhere, anytime. There are substantial productivity gains by having all training content aggregated and consolidated in one place. MyGuide creates a valuable jumping off point for users to navigate new applications and works with any type of application. Thus, exploring from the homepage of a new application becomes much easier and more engaging. Workflows are learned more quickly if guides are interactive and embedded within the application itself.

Search Insights

MyGuide provides valuable insights into how users are performing within an application, as well as how content and the application itself are being used. For example, the search data from an organization tells them what training areas are in demand.

User Engagement Insights

Change managers can gain an in-depth understanding of the usage data of each specific application and how it is performing via pages, features, workflows and funnel intelligence. This allows companies to delve deeper into the overall employee experience to empower higher levels of efficiency. Usage data helps paint a better picture of the onboarding process, the customer journey and how different types of users interact with an application.





MEASURABLE IMPACT

Increased System Proficiency

Westpac saw an uptick in system proficiency using analytics to monitor guides and user engagement. With a simple view of analytics, they were able to use the information to drive business decisions across various projects and understand what works best.

For example, Westpac measures their HR guides to monitor usage and drop-offs within a system. Insightful dashboards support leaders at Westpac and their goal to get users more engaged.

Productivity with Insights

During certain events, such as internal restructuring, implementation of new technology, events, or including a manager in a key process, MyGuide was able to provide contextual insights on adoption and productivity to functional leaders.

Reduced IT Costs

As more users continue to rely on MyGuide, there has been less of a burden at Westpac to manage a help desk. Support costs have been significantly reduced now that training is delivered at scale, “just in time,” and to support their in-app needs.

CUSTOMER TESTIMONIAL

“

The content is awesome and it makes my day so much easier. I am able to reference the workflow instructions quickly and right when I need it!

”

HOME LENDING MANAGER
Westpac

“

We are using MyGuide for training to help us deliver really complex scenarios. The participants love them!

”

DIRECTOR OF TRAINING,
Westpac

ABOUT EDCAST

EdCast, now part of Cornerstone, offers a unified Talent Experience Platform designed to operate end-to-end employee experience journeys spanning learning, skilling and career mobility. Its award-winning platform is used internationally by organizations ranging from large Global 2000 companies to small businesses and governments. With EdCast's platforms, organizations are able to attract, develop and retain a high-performance and future-ready workforce. EdCast's offerings include its Learning Experience Platform, Spark for SMBs, Content Strategy & Solutions and MyGuide Digital Adoption Platform. EdCast is a World Economic Forum Technology Pioneer award recipient.

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