



## CUSTOM TRAINING CAPABILITIES

PSI is committed to working with you to create training solutions that respond to your specific needs. We do this by focusing on your business goals, training needs and internal environment to create a program that is uniquely suited to the situation.

To learn more about our custom capabilities, please review the links below:

- [Development Process](#)
- [Development Team](#)
- [Representative Custom Projects](#)

### DEVELOPMENT PROCESS

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When you work with a firm to develop a custom program, you are buying an intangible, and we understand that. You are relying on our ability to provide valuable consulting and guidance, manage the project process tightly, obtain the information we need, and design and deliver a program that gets to market on time.

Our structured Development Process allows us to deliver on that promise and includes the following phases:

- **Assessment and Design**
  - This phase begins during our initial discussion with you and your team and includes:
    - Identification/confirmation of business and training needs
    - Determination of gaps between actual knowledge/skills and desired outcomes
    - Critical Success Factors for a project's success
  - Building on information gathered in our assessment, a detailed instructional design (or "blueprint) for the program will include:
    - Content outline
    - Instructional strategies
    - Technology strategies (if applicable)
    - Implementation and delivery approach
    - Project plan



- Development
  - Using the Design Document as a guide, this phase includes development of the core materials included in the program:
    - Storyboard scripts and prototype (for e-learning solutions)
      - Graphic look and feel of the program
      - Initial systems testing
      - Client review and revisions
      - Production of materials
    - Development of program materials (for traditional delivery methods)
      - Graphical look and feel of the program
      - Draft course materials including participant materials, instructors notes and overhead slides (if applicable)
      - Client review and revisions
- Testing
  - Once the program materials have been created and reviewed, we will work with your development team to field test the program with members of the intended audience.
  - For technology projects, field testing includes beta testing by your technology group as well as usability testing by members of the target audience.
- Implementation
  - Based on the results of the field tests, we will make one final set of revisions to the program prior to assisting you in an enterprise-wide roll out.
  - Once the program has been implemented throughout the organization, we will work with you to measure its success:
    - Using Kirkpatrick levels of evaluation
    - Against Critical Success Factors as defined in Assessment

We will also customize the process if needed, based on your needs and deliverables.

## **DEVELOPMENT TEAM**

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PSI draws on a skilled development team to ensure your project has the appropriate resources, including:

- Instructional designers
  - Our instructional designers will consult with you and your development team about all aspects of curriculum development. Our instructional designers bring expertise and experience of learning theory, instructional design and technology and course development to your project.



- Subject matter experts
  - Our subject matter experts bring a wealth of experience and knowledge to your project. Our subject matter experts will work with you to help shape the content to ensure that it meets the needs of your audience. We carefully identify the skills sets needed for each project and then align our subject matter experts against those parameters.
- Graphic designers
  - Our graphic designers are skilled at creating business oriented and creative graphic treatments for a wide variety of media types, including paper-based and electronic deliveries.
- Technology Managers and Programmers
  - Our technology managers and programmers are skilled in a variety of development tools and can create programs designed for web-based deliveries, CD-ROM deliveries, simulations and more. Our technology team will work with your internal technology group to ensure the design of the program meets your company's technology standards.
- Project Managers
  - Our project managers are responsible for overseeing all aspects of a project, to design, develop, and produce instructional programs for you. In addition, they serve as the main interface between your internal development team and the professionals at PSI.

PSI's team of skilled experts will work with you to ensure your program is complete and professional with every detail addressed.

## REPRESENTATIVE CUSTOM PROJECTS

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- E-Business Multimedia Training
  - PSI worked with a large global professional services firm to develop a five-hour e-Business multimedia program for the entire Assurance Practice. This course was rolled-out to over 7,000 professionals.
- Branch Manager Instructor-led Training
  - PSI was asked by a large financial institution to design and develop components of a comprehensive curriculum aimed at equipping bank branch managers with the business skills they need to be successful. As a result, PSI created two 1-day instructor-led financial management courses that teach learners how to make information-based decisions about the profitability of a branch. To enhance the effectiveness of the program, PSI used mini-simulations and creative learning techniques.



- Financial Tools Instructor-led Training
  - PSI worked with a large institution to design and develop intermediate-level training for financial analysts. The 2-day instructor-led program teaches the analysts how to perform financial analysis, build a solid business case and present it internally in-line with the bank's strategic objectives. This challenging program stretches the analyst's capabilities and is completely focused on real-life, banking case studies.
  
- Industry Solution Training – Online and Instructor-led Training
  - PSI provided the global training for launching a large solution initiative for a leading solution provider.
  - The training is designed for Sales, Sales Support and Field Marketing professionals with responsibility for identifying opportunities for the solution within the Financial Services industry and provides participants with the ability to:
    - Discuss specific applications of the solution in the financial services industry
    - Describe the components involved in the solution implementation, including technology architecture, client's professional services group and partner applications
    - Apply the steps involved in the solution sales process
    - Begin positioning the solution appropriately with financial services clients, including the value proposition, unique selling points and elements of financial return
  
- Executive Education Instructor-led Training
  - PSI created and delivered a highly interactive 5-day instructor-led session that provides the opportunity for a 'hand selected' group of participants, based on client selection criteria, to demonstrate their ability to effectively position their company in a solution-oriented and product selling situation.
  - Organized around a realistic Case Study, the program comprises a comprehensive observation process that serves as a foundation for evaluating and building an individual's development plan.
  - Participants are evaluated on their ability to position themselves, their company and their proposed solution with the needs and perspectives of different senior manager roles within their prospect account:
    - Financial Manager
    - Marketing Manager
    - Line Of Business Manager
    - IT manager