



*Integrating Strategies to Enhance Performance*

## Sample Consulting Projects

### **Global Financial Services Company: Investment Banking Technology Group**

- InStep Consulting provided **instructional design** services to support the Technology group's *Corporate University*.
- InStep staff consulted with senior Technology and Human Resources managers to identify learning objectives and strategic priorities.
- InStep helped managers to design interactive seminars for Technology staff to increase their knowledge and proficiency in:
  - Application/Project Management
  - Continuous Improvement
  - Effective Communication
  - Risk Management
- InStep staff also developed content and activities for the New Hire Orientation Program offered within the Technology group.

### **Global Financial Services Company: Private Banking Group**

- InStep Consulting provided **instructional design** services to support the development of an Orientation Program for Private Banking Relationship Managers.
- InStep staff conferred with internal product specialists and senior managers to identify learning objectives and priorities for the program.
- InStep also worked with internal and external subject matter experts to develop program materials, including in-depth case studies and hypothetical client profiles that aligned with the firm's products and strategic direction.
- InStep Consulting created a detailed facilitator guide with specific instructions for leading activities and recommended speaking points. Staff also conducted a *Train-the-Trainer* session with senior managers selected as facilitators to impart recommended training techniques.