

## Questionmark Case Study

### Perception Integrates with SAP® Learning Solution to Support Compliance and Human Capital Management

#### Case Study

#### Sanlam Personal Finance

#### Background

Sanlam Personal Finance provides a wide range of individual life insurance and personal financial services and solutions, including estate planning and trusts, home loans, personal loans, linked products, money transfer and financial services in South Africa, Namibia and the UK. The company is committed to providing cost-effective learning solutions that promote compliance and improve performance.

#### Documenting Compliance

Sanlam is continuously challenged to demonstrate its compliance with regulatory requirements by submitting detailed reports to the government to prove compliance and in many instances the competence of employees.

Sanlam had been running standalone assessments via Questionmark™ Perception™ for 10 years when it was decided to integrate Perception with the SAP Human Resources and Learning Management System. This combination would make it easier to document compliance-related activities. The integration has enabled Sanlam's training team to record training interventions against the qualifications and learning profiles of learners and at the same time allow the team to give learners feedback within Perception at a detailed topic level. Not only does the integration allow access to Perception's full range reporting features, it also gives facilitators and trainers access to the more comprehensive question types.

#### Real-Life Assessments

Perception helps brokers and advisors demonstrate a solid understanding of financial products. Perception Hot Spot or Drag-and-Drop questions ensure that call center staff know where to record information on official forms, and questions incorporating Adobe Captivate reinforce basic computer literacy skills. Quizzes reinforce learning throughout online and classroom training courses, and percentage scores from summative assessments at the end of each course provide a permanent record of achievement.

#### Distributed Authoring

Each of Sanlam's seven business units has one or two assessment authors who develop assessments. Authors use a shared repository, a single server and a SQL database. Some create questions and assessments using Perception Windows Authoring while other use Word documents that are converted to ASCII files for importing into Perception. Each high-stakes assessment starts with a Declaration of Authenticity.

#### Blended Delivery

At any one time, about 4,000 people in Kenya, Botswana, South Africa and Namibia are taking surveys, quizzes or tests. On average 14,000 assessments are taken per month. A robust server handles these assessments smoothly and efficiently. The company has used a wide variety of delivery platforms, including an intranet to, offline delivery, and CDs.

#### Actionable Results

The integration of Perception and SAP has helped Sanlam reduce training costs while improving its results and how they are reported. Perception reports help the training team convey the significance of employee survey results to business units. Org structure level reports generated on SAP can determine who completed the assessments; business unit heads can be informed of those individuals who have not completed the assessment as well as those deemed competent or not yet competent. Perception's Question Statistics Report reveals which questions received the most incorrect answers in bi-monthly product knowledge tests. The Coaching Report helps trainers provide important feedback to employees.

#### More information

##### Questionmark Contact:

Email: [info@questionmark.com](mailto:info@questionmark.com)

Phone: (800) 863-3950 • (203) 855-4500

Web: <http://www.questionmark.com/>

