



Questionmark Case Study

Scotiabank Call Centre Staff use Perception for 'Knowledge Reality Checks'

Background

Founded in 1832 in Halifax, Nova Scotia, Scotiabank is one of North America's premier financial institutions. As Canada's most international bank, the Scotiabank Group serves more than 10 million customers in some 50 countries in the Americas, the Caribbean, Europe and Asia.

Scenario

Scotiabank's Electronic Banking Contact Centres are located in Calgary, Halifax and Toronto, and employ over 1000 Sales, Service and Support staff. Prior to using *Questionmark Perception* testing and assessment software, both new hire and existing employee assessments were paper-based, with inconsistent administrative approaches. Monitoring national assessment delivery and results in this manner presented various challenges.

Knowledge Reality Check

In 1998, Scotiabank began using *Questionmark Perception* at the Toronto Contact Centre. Progressively, the online assessment program expanded to all three locations. Now known to Contact Centre employees as the *Knowledge Reality Check (KRC) Program*, accessed via a Sharepoint portal, KRC is the primary source for all assessment activities. From here, employees can:

- Access Post Training evaluations, monthly and regular product quizzes, and more complex case studies
- View a complete *Inventory* of current assessments available
- Review various *Tools*, for example, User Guides, FAQs, monthly articles, etc. created for each specific KRC user, including Managers, Trainers and Administrators
- Access Transcript and Coaching Reports for individual participants

Level 1, 2 & 3 Assessments

The KRC program offers over 200 assessments from a database with more than 7,000 questions to 2 distinct user groups:

1. New hires complete a series of Level 1 evaluations at designated intervals, as well as various Level 2 evaluations at the end of core training modules.
2. Existing employees complete assessments for refinement and sustainment of knowledge on an ongoing, as needed basis.

In addition, Level 3 questionnaires are completed for select programs throughout the year in support of an internal Return on Investment process. Employees also participate in preference surveys that are presented, administered and tracked using the *Questionmark* platform.

Meeting Corporate Goals

Perception is fundamental to the Contact Centre's learning strategy. It provides the Contact Centres with a way to embed the company's commitment to measuring training effectiveness while at the same time gaining administrative efficiencies. A small team of training evaluation specialists manages the program, and instructional designers familiar with curriculum and ongoing changes oversee the maintenance and creation of questions.

In 2005, Scotiabank established the framework for training evaluation for its learning community. The Electronic Banking Contact Centres have been able to easily align to corporate goals using *Perception* to automate evaluations, reporting and trending of training effectiveness.

More information

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