

Managing the Performance Management Process – e-Learning at Sun Life Financial

Sun Life Financial is a leading international financial services organization providing a diverse range of wealth accumulation and protection products and services to individuals and corporate customers.

Prospero partnered with Sun Life to assess the implications of implementing an e-Learning initiative to train managers across Canada:

- To better manage the Performance Management Process (PMP)
- To make strategic recommendations design
- To develop a web based instructional intervention

To accomplish this, **Prospero** conducted an analysis of: Strategic Issues and Desired Impact, Context, Target Audience, and Jobs/Tasks. The data was collected through extant data, electronic survey, interviews with HR managers, managers and subordinates, and focus groups. From the data we collected, we formulated objectives, performance criteria, and made recommendations on learning strategy and which medium for delivery Sun Life should consider.

On this project the Subject Matter Expert (SME) was in Toronto, the stakeholder was in Montreal, and the majority of the **Prospero** project team was based out of Montreal. The learners were spread out all across Canada in major cities and remote locations. Sun Life accepted our recommendations and contracted **Prospero** to design and develop an interactive, collaborative, and learner-centered intranet hosted, web-based learning solution. We assembled a team of educational technologists, courseware developers, web-developers, graphic designers, and a project manager.

Prospero designed and developed a 90-120 minute self-paced e-Learning course that was also modular, so it could be used as a performance support tool or just-in-time (JIT) job aid. The course is presently being used by Sun Life University to in a blended learning delivery to supplement the New Manager's Instructor-led course and as a JIT tool for experienced managers.

Deliverables for Sun Life Financial included:

- Training Need analysis (online survey, interviews, and focus groups) of Performance Management Process for Managers. Process included assessment of implications of different training solutions on the managers across the organization across Canada.
- Making recommendations on strategic courses of action to get the best results.
- Designing a prototype for the look and feel of the chosen e-Learning solution.
- Performing all the instructional design, including writing all content for the 90-minute course.
- Developing the e-Learning course from the storyboards provided by instructional designers, including all graphic design.
- Creating a beta version of complete course for walkthrough and pilot.
- Creating the final version of the interactive, online training course for Managing the Performance Management Process

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