

FWD's Personalized eLearning with Video Helps Employees Comply with Gifts, Anti-Bribery Policies

FWD Group and Guroo Producer
 Best Advance in Compliance Training
 October 2019



Company Background



Company-at-a-Glance	FWD Insurance
Headquarters	Hong Kong
Year Founded	2013
Revenue	More than \$2.8 billion in assets
Employees	4,600
Global Scale	FWD Group spans Hong Kong and Macau, Thailand, Indonesia, Philippines, Singapore, Vietnam, Japan and Malaysia. Bank partners include Bank of Communications (Hong Kong) Limited, China Construction Bank (Asia) Corporation Ltd, and Industrial & Commercial Bank of China (Asia). Retail partners include 7-Eleven, Cathay Pacific Airways, CSL Mobile, Sony, Tap & Go Payments, and 3 Hong Kong by Hutchison Telecommunications.
Customers/Output, etc. (Key customers and services offered)	FWD has approximately 3 million customers worldwide, offering life and medical insurance, general insurance and employee benefits across a number of its markets.
Industry	Insurance
Website	www.fwd.com

Company Background



Company-at-a-Glance	Guroo Producer
Headquarters	Surry Hills, New South Wales, Australia
Year Founded	2016
Revenue	AUD \$2.2 million
Employees	16
Global Scale (Regions that you operate in or provide services to)	International operations including Australia, New Zealand, Malaysia, Hong Kong and Thailand
Customers/Output, etc. (Key customers and services offered)	Key customers include Woolworths Group, Westpac Group, FWD Group, Caltex Australia, Blackmores, Australian Graduate School of Management, University of Queensland, University of Technology Sydney, University of Western Sydney and Monash University. Guroo Producer's services range from project-based learning design and production, to licensing of the production platform for self-authoring.
Industry	Learning Design and Software
Website	www.gurooproducer.com

Budget and Timeframe

Overall budget	\$31,050 AUD and GST (this included English language versions for eight markets and translated versions for six markets)
Number of (HR, Learning, Talent) employees involved with the implementation?	Four
Number of Operations or Subject Matter Expert employees involved with the implementation?	Five
Timeframe to implement	Three months
Start date of the program	June 2018

Business Conditions and Business Needs

FWD is a growing organization with 4,600 employees across Hong Kong and Macau, Thailand, Indonesia, Philippines, Singapore, Vietnam, Japan and Malaysia. Within each branch of the organization, FWD compliance officers must address the issues surrounding inappropriate gifts, entertainment and the potential for bribes. Each country has its own Gifts, Entertainment and Anti-Bribery (GEAB) policy, although across all countries the policy is relatively similar with some minor differences in the gifts category.

FWD was concerned that existing training was not effectively engaging long-time or new employees with the GEAB policy. The training was quite long, and the scenarios were communicated using 3D animated video that required the employee pay close attention to the situation being described by a voice-over narrator. After each scenario, the employee was then asked a question about the situation. This was a good approach for determining their ability to absorb the existing training but did little to measure whether or not they already understood how to apply the GEAB policy — a question compliance officers wanted answered, particularly when it came to long-time employees.

To improve the identified business conditions surrounding its GEAB training, FWD saw the need for a new compliance module and a new learning-development platform. The technology FWD used for the original training could not tailor the learning in the manner it desired, as it wanted the new module to suit existing and new staff at all levels and in all locations of the company.

So, FWD partnered with Guroo Producer to create an eLearning compliance module that personalized the learning. This new personalized version would help to determine who was already able to apply the policy, while also offering further training to those who

failed to pass the pre-assessment phase. It would also answer the need to provide GEAB policy training to a growing employee base without having to make multiple modules based on the same policy. With the new design, existing/long-term employees could potentially breeze through the training in minutes if they knew the policy well, whereas newer employees, and even contractors, would still receive the appropriate level of training suited to someone unfamiliar with the policy.

Overview

The compliance training was designed to address the goal of ensuring that all FWD employees and contractors begin and/or continue to adhere to a high level of personal and professional conduct and compliance when carrying out their duties under FWD's Code of Ethics and Business Conduct. FWD also established the goal of rewarding existing employees for understanding how to implement the GEAB policy with shortened training and digital badges to acknowledge their efforts.

To meet the first goal, Guroo Producer created a 20-minute eLearning module, inclusive of a 2-minute animated video, with the purpose of ensuring all FWD employees and contractors understand their responsibilities and are compliant with FWD's GEAB policy. The eLearning uses challenges to assess the learner's understanding of policy requirements and experiential scenario-based learning, providing context to work based situations, allowing learners to understand the consequences of their choices.

To meet the second goal of shortening the learning for existing employees who already correctly implement the GEAB policy, the content was made adaptive with a series of "go-to" functions, personalizing the experience for each individual. For example, if employees were successful at answering every pre-assessment question correctly, the module took less than 10 minutes to complete. For some who understood the gift aspects but not the entertainment aspects of the policy, the training would have taken approximately 14 minutes. This aspect of the training was received favorably in the organization, saving time for employees and acknowledging them for their due diligence.

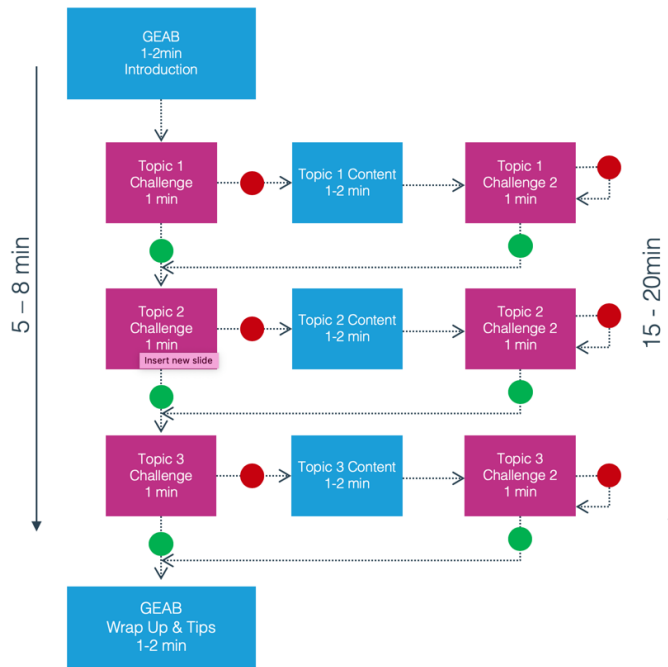
Figure 1: Compliance Training


Illustration provided by FWD Group

The international audience reach also significantly impacted the FWD organization in a positive way. All employees and contractors across all country locations received the same key messages through the training, but each version was tailored to meet the linguistic and cultural needs of each office location. Eight different language versions of the compliance module were developed and the minor differences in the GEAB policy in each country were also adapted for these versions.

Lastly, as mentioned, FWD's previous training was technically limited, with pre-recorded voice-over and uneditable scripts. FWD established the goal of improving the interactivity of the training and to develop it in a platform that enabled easy changes if the policy were to change. Using Guroo Producer's authoring tool, this objective was successfully achieved.

Design and Deployment of the Program

During the design phase, Guroo Producer learning designers mapped the business goals to the learner capabilities and developed personas for the target learners. While the training was intended for a large and varied audience, it was determined that one framework module would be sufficient to meet the needs of the organization, if this version were then appropriately contextualized to the culturally and linguistically different audiences.

One version of the module was designed in English, and then modified accordingly to adhere to cultural norms for its respective country. For example, what is considered an extravagant gift in one country may be considered an acceptable gift in another, or vice versa.

The translated and modified versions were created for Hong Kong and Macau, Thailand, Indonesia, Japan, Vietnam, Singapore and Philippines.

The core design consideration was the personalization used to meet the varying pre-existing knowledge levels of the audience. It was decided that when beginning each topic, the learner would be required to complete a series of challenge questions to assess their understanding of the topic. If successful, they progressed to the next topic and challenge, without having to complete any additional learning. However, if unsuccessful in the challenge, the learner was required to complete additional learning and scenarios.

To improve overall engagement and interactivity during these challenges, digital badges were added for the successful completion of each core scenario. This was designed to instill a sense of achievement in the learner for understanding the GEAB policy and to enhance recall of these associated elements.

A virtual host/virtual guide (avatar) was designed to present a universally approachable and relatable FWD employee. She poses questions to elicit reflection opportunities throughout the module. This design aimed to promote and form connections between the learner and the later situations and scenarios described in the module, essentially answering the unspoken question of: What does this have to do with me? The guide was artistically designed to be friendly in appearance, as it was key to show the employees that FWD is working with them to understand the policy.

The feedback for each scenario was designed to detail the rationale behind the policy. This was a key element missing from the original training. Instead of simply stating "this is wrong," the feedback highlighted that there may be gray areas when implementing the policy, and to always seek guidance and advice from the respective compliance officers. The feedback was also designed to instill a sense of responsibility in the learner with the aim of improving compliance at an individual level.

After development, each module was successfully deployed to each country's office via their LMS. This allowed the different countries to track completion and review individual scores.

Change Management Efforts

The development of the module occurred in parallel with the change of the FWD brand for their online training. This included a change of core brand colors, language and extremely different art styles. The original training employed a “semi-realistic” 3D art style, which was not aligned to the FWD’s new branding. The new art-style was developed at FWD headquarters and was provided to Guroo Producer’s illustration team, who then developed interactive characters that would work well in the new module.

The transition of the brand identity did present some minor challenges for Guroo Producer, particularly in the coordination of Australian-based artists and FWD’s Hong Kong-based marketing department. An iterative and agile development process allowed Guroo Producer’s illustration team to present the new identity elements in conjunction with the module development and receive feedback via their own platform. This increased the time spent in the review rounds, however, it ultimately resulted in the production of a module that completely satisfied the new brand requirements for FWD. Although a little time consuming, this process was worth the effort in laying the foundations for FWD’s next series of training, which will employ the same artistic elements.

Linguistically, the program was designed first with an English-speaking audience in mind, as the core team from FWD and Guroo Producer are native English speakers. From there, it was recontextualized for Hong Kong and Macau, Indonesia, Japan, Philippines, Singapore, Thailand and Vietnam audiences, in partnership with translation services, ensuring the GEAB policy messages were still conveyed effectively in the non-English versions did present a challenge. Careful reviewing of each version and minor modifications to grammar and the sequence of the learning resulted in effective multilingual versions.

Measurable Benefits

FWD saw an immediate increase in completion rates during the first few weeks after the launch of the module. About 84% of the employees completed it within the initial launch timeframe, and this amount increased to 94% before the compliance completion due date. This is a marked improvement on the results of FWD’s previous GEAB module, as it, on average, was only completed by 70% of employees prior to the due date.

Part of the module’s success was due to the addition of the pre-assessment component, which personalized the training for learners. When employees heard the new training could potentially only take 5 minutes to complete (if everything was answered correctly), they were more onboard with the idea of it. Divisions reported there was, in fact, an

eagerness among employees to get it done and just to try out the new module style to see how it worked.

The learners gave positive feedback on the overall look of the course, which paired FWD's new brand identity with company policy. The playful characters and engaging animation held the attention of the learners for the duration of the module, offering some light relief amidst otherwise serious topics.

They also liked the scenarios presented in the module, which were carefully constructed to present relatable situations but remain concise in their delivery of the key concepts. There were no complaints about the length of the module.

After the training, FWD noted an increase in inquiries relating to its GEAB policy, with questions asked about more specific types of gifts or entertainment needing to be reported. FWD also noted an increase in reporting from other departments after the course was launched. This presents an opportunity for further learning and it demonstrates a level of engagement achieved via the training.

The module also does not refrain from communicating the repercussions of non-compliance and does so in a manner that appears to have instilled further trust and a sense of responsibility in FWD employees.

Overall

Guroo Producer's key value proposition is adaptive and personalized experiences, so this part of the project was something their team was very comfortable with. From FWD's point of view, the pre-assessment for each topic markedly helped improve engagement. FWD had received complaints before that their compliance modules were too long and sometimes overly repetitive. Using the pre-assessment resolved these types of complaints, because if the learner knows the concepts already, they can breeze through the training and be back to work a lot sooner.

The visual design of the module was surprising to some learners at first, as they were not used to a virtual avatar "speaking to them." Overall, this design was well-received, with learners commenting that the avatar interactions made the module more enjoyable to do.

FWD has launched the multilingual versions in Japan, Thailand, Singapore, the Philippines and Vietnam. FWD consistently received positive feedback from local compliance teams and received the fastest completion rate for a compliance program, now at 100% completion. FWD sees this as a sign that employees are positively promoting the training to their colleagues.

Developing modules in multiple languages and working with translation services was something Guroo Producer's learning designers were less familiar with. Therefore, this project helped Guroo Producer to develop multilingual features in its production platform, paving the way for future multilingual programs with improved capabilities. During the translation process, Guroo Producer's responsive design supported the difference in sentence length as a result of the translated content.

When writing and developing compliance scenarios for linguistically and culturally diverse audiences in the future, Guroo Producer and FWD recognize that different cultural nuances should be considered more extensively during the design phase. For example, in China, small cash gifts are culturally acceptable; however, in Indonesia, this gift would be considered a bribe.

FWD has begun its next project with Guroo Producer to provide further compliance training to their employee base in other topics.

About Brandon Hall Group

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