



Brandon Hall Group

# EXCELLENCE AWARDS 2023

## S&P’s Learning Team Works Closely With Organization to Address L&D Needs

S&P Global Market Intelligence

Best Learning Team

March 2024



### Company Background

**S&P Global**

Market Intelligence

Company-at-a-Glance	
Headquarters	55 Water Street, New York City, New York 10041, USA
Year Founded	1917 (S&P Global)
Revenue	\$4.1 billion (Market Intelligence)
Employees	17,000+ (Market Intelligence)
Global Scale	70 offices in 45 countries across the Americas, EMEA, and APAC
Customers/Output, etc. (Key customers and services offered)	<p>Key customers include commercial banks, government &amp; regulatory agencies, insurance firms, investment banks, investment managers, private equity firms, professional services, corporations, and academia.</p> <p>Market Intelligence leverages its data scientists’ extensive expertise alongside cutting-edge technology to drive growth, improve efficiency, and mitigate risk among its customers. In short, Market Intelligence is a one-stop shop for a wide array of data and solutions requirements.</p>
Industry	Financial services
Stock Symbol	NYSE:SPGI
Website	<a href="https://www.spglobal.com/marketintelligence/en/">https://www.spglobal.com/marketintelligence/en/</a>



## Budget and Timeframe

Budget and Timeframe	
Number of (HR, Learning, Talent) employees involved with the implementation?	20
Number of contractors involved with implementation	None

## Business Conditions and Business Needs

S&P Global Market Intelligence (MI) houses an extensive Sales & Marketing department which has seen exponential growth over the past 12 months because of the recent \$140-billion merger (based on Enterprise Value) with the Financial Services (FS) division of IHS Markit. This has led to the introduction of seven distinct business units consisting of over 2,000+ employees: *“Data, Valuation & Analytics,” “Credit & Risk Solutions,” “Research, Advisory & Specialty Solutions,” “Network & Regulatory Solutions,” “Markit Digital,”* and *“Desktop & Channels.”* Through those different groups, Market Intelligence sells over 270 cutting edge products to over half a million customers in 35 competitive markets across the Americas, EMEA, and APAC - all of which constitute a lucrative \$70-billion addressable market. Consequently, to better serve their clients, all sales reps are required to develop extensive knowledge of those offerings, as well as of complex industries, markets, and client workflows.

Moreover, MI’s customers are wide-ranging and highly sophisticated; they include commercial banks, government & regulatory agencies, insurance firms, investment banks, investment management houses, private equity firms, professional services enterprises, non-financial corporations, as well as prestigious universities. As a result, all client-facing staff (irrespective of tenure and experience) must be highly articulate, conversant, and well-informed in a variety of challenging domains such as Risk & Compliance, Portfolio Management, Banking, and Investor Relations (among others).

The products on offer to address those diverse audiences include state-of-the-art financial desktop solutions, data distribution systems, credit & risk management tools, private markets intelligence, supply chain platforms, as well as environmental, social & governance (ESG/Sustainability) data and analytics.

Given such complexities, relevant and engaging learning programs that are tightly aligned with MI’s Go-To-Market strategies are indispensable. Indeed, for the frontlines to hit their



demanding growth targets, a well-structured L&D team that can effectively and consistently deliver blended learning approaches across robust onboarding programs, continuous learning curriculums, and bespoke coaching sessions is essential. That is where the MI Education team comes into play.

## **Overview**

### The MI Education Learning Team - Overview

MI Education is a global team of 20 highly experienced Education Specialists deployed enterprise-wide across 9 countries and serving over 70 offices in 35 markets. Its aim is to equip the commercial frontlines with essential skills and knowledge to help them deliver an exceptional, differentiated customer experience, and ensure long-term career success.



The combined team holds decades worth of extensive sales and industry experience, multilingual skills, and pertinent L&D accreditations to deliver best-in-class programs. Moreover, several trainers joined MI Education directly from the organization's commercial frontlines and bring invaluable first-hand knowledge of the workflows and challenges encountered by the sales representatives they work with each day.

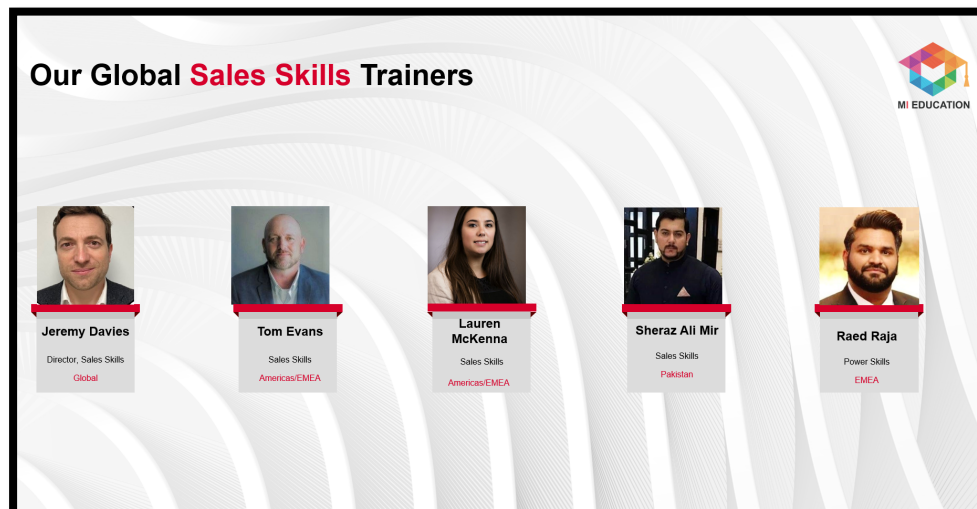
The team has developed a comprehensive menu of 150 learning experiences for onboarding new and existing employees, as well as addressing the ongoing education needs of an increasingly hybrid/flexible workplace, including offering in-person, Zoom, bite size eLearning and interactive videos, etc. Furthermore, several of those programs are regularly delivered in different languages, as part of content localization efforts throughout key international offices including London, Islamabad, Shanghai, Tokyo and New York.



The team is structured into three groups: Global *Sales Skills* Trainers, Global *Product* Trainers, and Global *Operations*.

## Global Sales Skills Training Team

MI Education’s Sales Skills training team consists of 5 full-time individuals committed to building, curating, delivering, and coaching sales skills that are essential for the commercial frontlines to master so they are well-prepared in front of our clients. With a combined 45 years of sales experience, the group engages in weekly stakeholder meetings across the manager groups within each of the 5 different business units to stay abreast of the critical commercial challenges and subsequent upskilling needs of client-facing staff. The team provides scheduled training sessions for new joiners through a comprehensive onboarding curriculum, as well as for tenured staff through ad hoc customized training programs as part of a continuing education learning path. Since 2022, the role of the product trainers has expanded to include aspects of instructional design, such as developing in-team sessions on topics specific to their requirements and not available in the wider curriculum, and more recently through internal role specific learning paths.



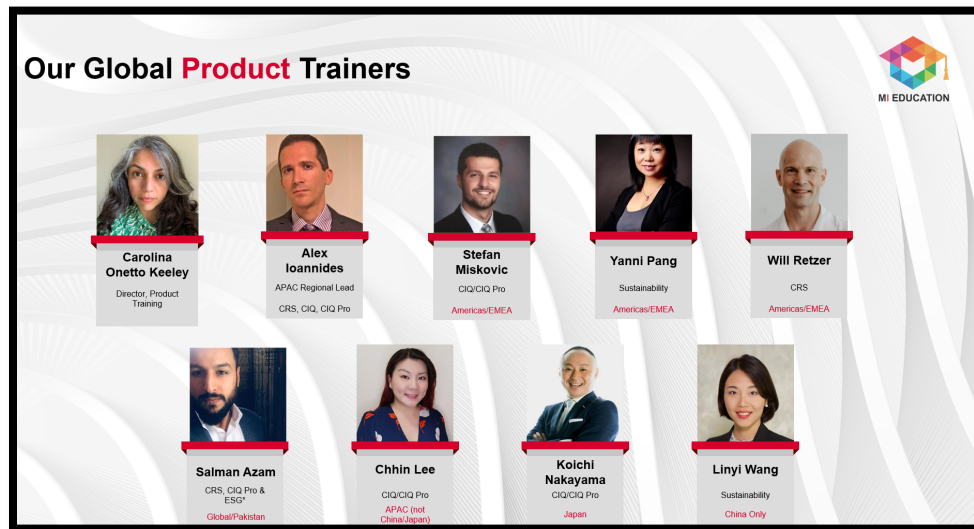
## Global Product Training Team:

MI Education’s Product Training team consists of 9 full-time individuals whose primary focus is training, developing, and implementing learning strategies that meet business needs. They work closely with Product Managers, Sales Managers, and other stakeholders to ensure their training programs accurately reflect the latest features, functionality, and overall strategic direction of the company’s key product offerings. Since 2022, the role of the product trainers has developed to include aspects of instructional design, such as





developing creative visual instructional graphics, and creating materials and media (audio, video, simulations, role-plays, games, etc.) that support more interactive and engaging learning activities. The team’s diverse background and range of experience across multiple regions means it can apply customized and innovative approaches to overcoming challenges that include changing priorities, evolving team structures, and championing certain training programs to obtain managerial buy-in and learner commitment.





### Global Operations Team:

MI Education’s Operations team consists of three specialized groups including Support Specialists, Digital Content, and Data & Analytics. The Support Specialists manage logistics for all learning engagements across the globe. The Digital Content Team is responsible for MI’s Sphere Space (internal communications page), learning technology, infographics design, animations, e-learning content development using Articulate Suite, and more. The Data & Analytics team designs robust dashboards and actionable insights using Microsoft Power BI, which integrates with various learning technologies including CRM, CSM, and CHM platforms.




### Learning Operations Team







**Hugh Pleasants**  
Head of Learning Operations




**Ayesha Hameed**  
Education Support Specialist




**Avegail Soriano**  
Education Support Specialist




**Sobiya Rahat**  
Education Support Specialist



**Rehan Tayyar**  
MI Education Data Lead



**Gabriel Gumabon**  
Education Enablement Manager



**Nico Alves**  
Digital Content Specialist

Learning Operations Responsibilities						
Learning Offerings	Communications	Knowledge Management	Finance & Budgeting	Learning Xchange	Reporting & Analytics	Product Certifications
<p><b>Ayesha Hameed</b></p> <ul style="list-style-type: none"> <li>- STRIDE (India)</li> <li>- CPC (India)</li> <li>- Commercial Development Certification (Global)</li> <li>- Product Learning Series (Global) Workshops (Americas &amp; EMEA)</li> <li>- Hosted Sessions (Americas &amp; EMEA)</li> </ul> <p><b>Avegail Soriano</b></p> <ul style="list-style-type: none"> <li>- CYSI (Global)</li> <li>- Workshops (APAC)</li> <li>- Leading with Capital IQ Pro (Global)</li> <li>- Integration Learning Program (Global)</li> <li>- Hosted Session (APAC)</li> </ul>	<p><b>Hugh</b></p> <ul style="list-style-type: none"> <li>- Shared Mailbox</li> <li>- Broader Communications</li> <li>- <a href="#">Communications Cadence</a></li> <li>- <a href="#">Documentation</a></li> </ul> <p><b>Avegail Soriano</b></p> <ul style="list-style-type: none"> <li>- Smartsheet Calendar</li> <li>- Events Calendar on Sphere</li> </ul> <p><b>Gabriel Gumabon</b></p> <ul style="list-style-type: none"> <li>- Education Newsletter &amp; Statistics</li> <li>- Collateral Design (Global)</li> </ul>	<p><b>Ayesha Hameed</b></p> <ul style="list-style-type: none"> <li>- <a href="#">Course Catalogue</a></li> <li>- E-learning Catalogue</li> <li>- SharePoint Pages</li> <li>- Sphere</li> </ul> <p><b>Avegail Soriano</b></p> <ul style="list-style-type: none"> <li>- Guidelines &amp; Documentation</li> <li>- Learning Materials Repository</li> <li>- Training Recordings</li> </ul>	<p><b>Ayesha Hameed</b></p> <ul style="list-style-type: none"> <li>- Tracking Expenses</li> <li>- Budgeting Dashboard</li> <li>- Purchase Orders</li> <li>- Concur</li> <li>- ARIBA</li> <li>- Budgeting Smartsheet</li> </ul>	<p><b>Ayesha Hameed</b></p> <ul style="list-style-type: none"> <li>- Course Assignments in LX</li> <li>- LX Attendance &amp; Completion Management Updates</li> <li>- Course Updates</li> <li>- Learning Xchange reports</li> <li>- LX Virtual Classes for learning offerings</li> </ul> <p><b>Hugh Pleasants</b></p> <ul style="list-style-type: none"> <li>- DMS New Learning Path</li> </ul> <p><b>Gabriel Gumabon</b></p> <ul style="list-style-type: none"> <li>- New e-learning courses</li> </ul>	<p><b>Rehan Tayyar</b></p> <ul style="list-style-type: none"> <li>- Updating Analytics &amp; Scorecards</li> <li>- Statistics for Townhalls/Meetings</li> <li>- Maintaining repositories for Reporting</li> </ul>	<p><b>Avegail Soriano</b></p> <ul style="list-style-type: none"> <li>- Ensure Live Demo Feedback is Updated in Repository</li> <li>- Digital Badges</li> <li>- Certification Scheduling (APAC)</li> </ul> <p><b>Ayesha Hameed</b></p> <ul style="list-style-type: none"> <li>- Certification Scheduling (Americas &amp; EMEA)</li> <li>- Answer Checking</li> <li>- Refresh</li> <li>- Weekly Certifications Report</li> <li>- CYSI Written certs technical difficulties</li> </ul>

### The Combined MI Education Team

Among its many offerings, the MI Education team delivers recurring flagship programs that include an onboarding syllabus for new joiners, continuing education courses to reach wider audiences and drive performance, one-on-one coaching sessions to suit the distinctive training requirements of certain individuals, and on-demand e-learning modules for those preferring self-paced and self-service learning resources. Where applicable, the team rounds off these initiatives with comprehensive, graded exams (in the form of written tests and demos) to ensure consistency, proficiency, and high standards throughout.



Using proven and intuitive teaching methods within carefully tailored and interactive programs, MI Education's assigned goal is to teach a multitude of crucial topics and skillsets that employees with varying levels of experience can apply in their day-to-day roles. This enables trainees to meet (and even surpass) their yearly objectives, resulting in greater opportunities, faster career advancement, and superior job satisfaction. In essence, through a mix of tailored e-learning modules, instructor-led training sessions, one-on-one tutorials, as well as knowledge checks and certifications, MI Education effectively teaches the real-world application of numerous solutions, systems, and professional skills to ensure all employees thrive and directly contribute to the business' achievements and success.

When considering MI Education's L&D impact on the organization, the team not only relies on traditional methods of assessing the success of its programs (completion rates, recommendation scores, etc.) but also seeks to focus on a broader range of outcome-based metrics, such as the impact on individual employees, their overall engagement in learning, and the influence learning has on the strategic direction and processes of the business. Therefore, the team frequently considers the following questions:

- How effectively does the learning strategy, curriculum, program, or session support the organization's priorities?
- How well do the programs help colleagues build the mind-set, skills, and expertise they need most?
- How can MI Education collaborate more effectively with the Sales, Product, Marketing teams to drive better business results, experience, and overall ROI?
- To what extent does the MI Education team strengthen the learning culture's vitality and DNA within the organization?

Ultimately, MI Education seeks to do more than merely offer training sessions for employees to refresh their skills or remain up to date with enhancements and trends. The team also works diligently to reinforce the organization's values and a culture of learning. The aim of such efforts is to help drive strategic initiatives, inspire sales professionals, and attract and retain high-quality talent.

*MI Education - Expected Business Impact:*

## Learning Approaches

### MI Education Methodology & Approach

The MI Education team began implementing aspects of the blended learning approach in 2019 but accelerated this process when COVID-19 hit, and the world was thrust indoors. To support the shift in focus to e-learning and virtual/live methods, the team conducted extensive research on L&D organizations whose methodologies are recognized as best practice in this domain. To supplement these best practices, the team assembled a library of interviews and consultations with internal stakeholders including the Sales, Product, and Marketing departments, as well as leadership across all business units, which was used to shape and refine Education programs. Furthermore, all members of the team are upskilled in e-learning and virtual training methods, which included empowering everyone with instructional design methods via the [ATD Instructional Design Certificate](#) program.

Come 2022, MI Education began leveraging learning theories like ADDIE, SAM, Blooms Taxonomy, and the ATD E-Learning Design Model to apply best practices during the needs assessment process, as well as for the creation and delivery of blended courses.

Key pillars underpinning MI Education's training and program framework include:

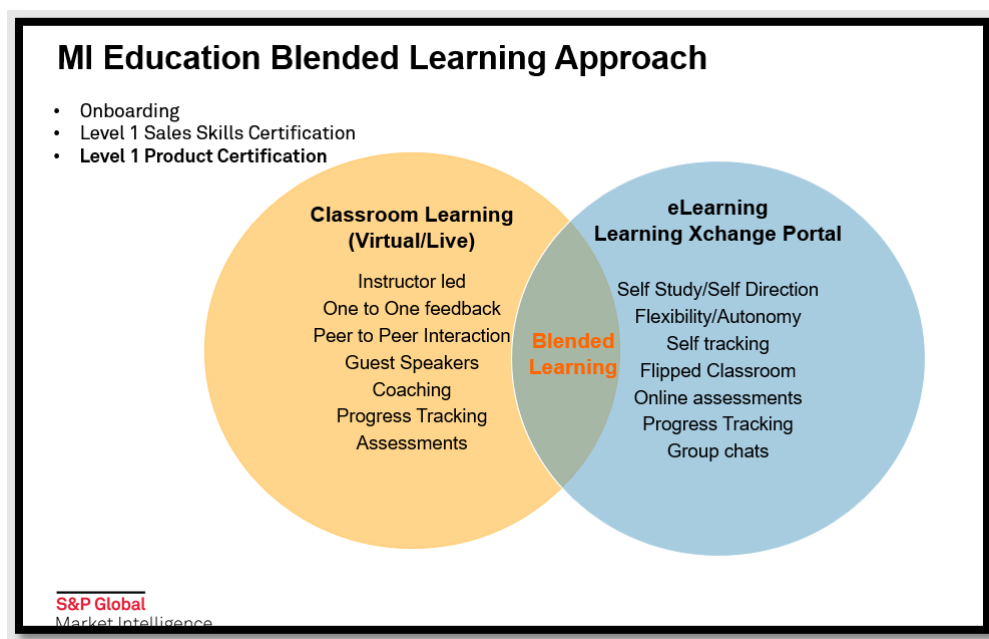
- o Identifying behavioral outcomes and creating learning objectives that are aligned to business goals, as well as learner needs



- o Applying elements of the Successive Approximation Model (SAM) and Iterative Design (Agile approach), as the team leverages stakeholder and learner feedback to quickly develop, curate, and deliver meaningful learning opportunities
- o Recognizing that adult learners have an existing base of knowledge and require learning opportunities that offer flexibility, as well as some level of autonomy and self-direction (Andragogy - Malcolm Knowles)
- o Working with the learner, stakeholders, and subject matter experts to design trainings that reinforce knowledge through Practice & Performance, “training that supports performance”

MI Education’s blended learning strategies and programming denote more than just virtual/live instructor-led training sessions versus e-learning modules. Instead, they entail a combination of elements, modalities, and learning activities to support client-facing teams. Sometimes, this means setting aside group training sessions and offering alternatives like one-on-one coaching or providing more learning time, additional instructional resources, or activities that encourage peer-to-peer interactions.

*A Digest of MI Education’s Blended Approach:*



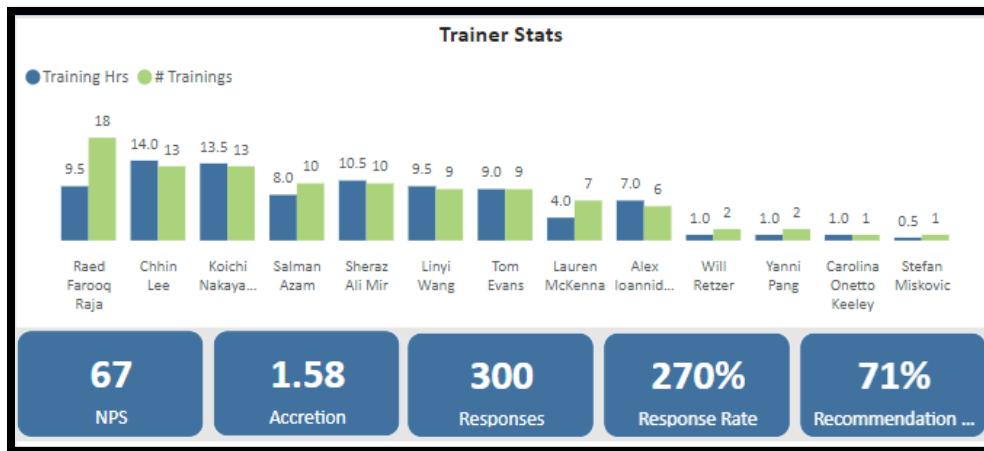


## MI Education Teamwork & Collaboration

Being able to work seamlessly within the 3 units of the MI Education team is essential for its success. For example, the Operations team, which maintains and runs critical back-end logistics, digital media, and analytics for all large- and small-scale programs, must maintain a close working relationship with the Product and Sales Skills trainers to ensure efficient and effective delivery of content.

The combined team meets on a regular basis to discuss findings and analyze key trainer and program metrics like Net Promoter Score, Recommendation Rate, Feedback Response Rate, and Learning Accretion.

### Screenshot of MI Education’s Power BI Dashboard – Trainer Stats:

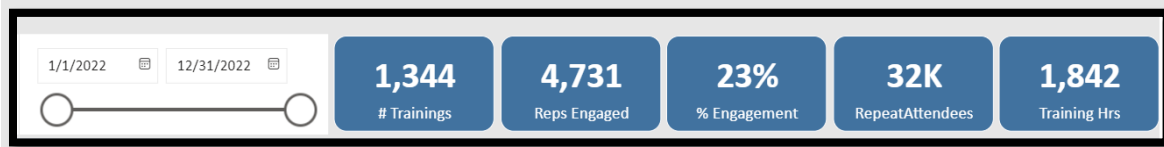


The operations team also manages the Learning Management System (LMS) platform and integrated training analytics dashboard to track L&D activity and program KPIs that include:

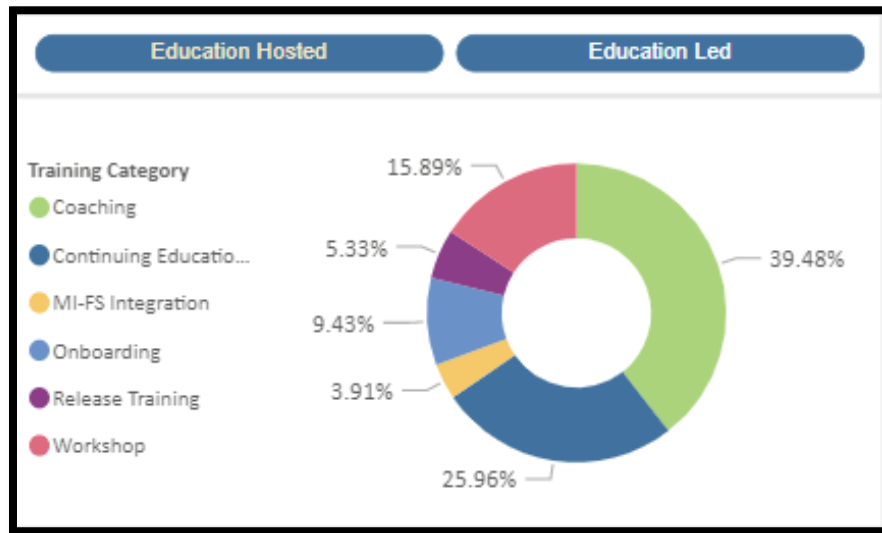
- Course attendance rate
- Course concentration
- Average time to completion
- Employee engagement
- Knowledge and skill retention
- Impact on organizational performance metrics



Screenshot of MI Education’s Power BI Dashboard – Training Insights:



Screenshot of MI Education’s Power BI Dashboard – Training Category Engagement:



This emphasis on reviews and retrospectives, both as a team and with stakeholders, puts the focus on continuous improvement, which is critical to the success of those same stakeholders and their teams. As such, to ensure and maintain high levels of relevancy, the programs are frequently adjusted to reflect the varied perspectives and diversity of trainees and their clients. Weekly meetings with sales teams are thus arranged to discuss deliverables and schedules, in addition to quarterly calls with senior stakeholders and management to share important updates, as well as review and understand drivers of further change. Moreover, evaluations are held post-program or following pilot launches to ensure business objectives are met and, if necessary, do the recommended fine-tuning as early as possible.





## **Delivery of Solution**

MI Education functions as a shared service across the S&P Global Market Intelligence organization and its seven distinct business units, each with their own needs and areas of specialization.

The team's overarching objective and purpose is continuous partnership with senior leaders, managers, and learners (particularly in the Sales & Marketing and Product departments).

As a fully integrated learning team, the MI Education team perpetually seeks to increase L&D efficacy, improve productivity, and deliver greater returns on investment for the business. In this regard, cost reductions through minimized duplication, standardization of approaches for learner certifications, and shared technologies and reporting are just some of the wins the MI Education team has been able to achieve.

In 2022, the team managed 89% Individual rep engagement against a goal of 75%, servicing over 2,000+ individuals, via more than 900 workshops and over 500 coaching sessions. This is an especially impressive feat given the changing landscape, large projects in development, and the size of the team in relation to the newly combined organization.

Another significant achievement for the team was stakeholder engagement. This involved meeting with over 100 stakeholders, top learners, and subject matter experts, to compile and assess L&D needs, uncover challenges and knowledge gaps, and develop relevant learning programs (including the two major projects relating to integration and IGNITE onboarding). These various programs and initiatives have helped establish MI Education as valuable partners and L&D experts who consistently deliver relevant and engaging learning experiences across all business units.

## **MI Education Program Offerings & Resources**

MI Education offers over 150 learning experiences and resources with the aim of addressing the onboarding and continuing education needs of client-facing teams.



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# EXCELLENCE AWARDS 2023

A snapshot of the MI Education Sphere site and landing page, highlighting the team's vision and year-round learning programs:



MI Education's "Sphere" page explicitly calls out the team's vision as well as upcoming learning opportunities in the "THIS WEEK IN MI EDUCATION" section

Enable our frontlines to hit their growth targets by providing relevant & engaging learning experiences, tightly aligned to MI's Go To Market Strategy. By providing blended learning approaches across a global onboarding program, a continuous learning path program, and Product Release Training, we help equip our frontlines with the essential skills & knowledge to help them deliver an exceptional, differentiated customer experience and drive long-term career success.

MI Education's comprehensive landing site with click-through pages and links to everything L&D related

### THIS WEEK IN MI EDUCATION

- April 11 (09:00 AM - 10:00 AM HKT) APAC | 23.04 Release Value Training | Credit Risk Solutions
- April 11 (04:00 AM - 05:00 AM ET) EMEA | 23.04 Release Value Training | Credit Risk Solutions
- April 12 (04:00 PM - 04:30 PM HKT / 04:00 AM - 04:30 AM ET) Mindtickle Platform Overview Training (Option 5)

### Discover Sales-Readiness with Mindtickle



MI Education publishes latest news impacting the commercial org including upcoming product releases and inspirational reads

Offers more than 153 blended-learning experiences for various learning needs. Our signature onboarding program is called Ignite. It provides foundational knowledge to help new hires get up to speed in their new role. Our continuing education program targets personalized learning at scale to drive performance. We offer regional-specific programs & 1:1 coaching with our Ignite Specialists. Here you'll find confidential coaching & training skills, product knowledge, personal growth & more.

**UPSKILL**  
Upskill is our continuing education program that provides sales and marketing...

**IGNITE**  
IGNITE is MI Education's signature onboarding program. [click here to REGISTER](#)

**MI Education Partners with...**  
MI Education partners with Mindtickle. Mindtickle is an industry leader in the...

**MI Education Coaching**  
Education offers coaching sessions for all Sales & Marketing employees. This is a...

### Latest News

- Discover Sales-Readiness with Mindtickle  
7 days ago | 134 Views
- Book of the Month - Radical Candor  
8 days ago | 74 Views
- 23.04 Release Value Training Cycle is Here!  
14 days ago | 80 Views | 1 Reaction
- Get Your Mind Ticked!  
14 days ago | 36 Views
- Release Value Training 23.01 - Report  
a month ago | 97 Views

[VIEW ALL](#)

### Upcoming Events

- 11 Apr 23.04 Release Value Training | Capital M  
9:00 PM - 9:45 PM
- 12 Apr 23.04 Release Value Training | Financial  
10:15 PM - 11:00 PM
- 13 Apr 23.04 Release Value Training | Credit Ris  
11:00 AM - 12:00 PM

MI Education's Sphere Page combines visuals with multilevel navigation for enhanced user experience and easy access to all learning programs including Upskill, Continuing Education, curated eLearning Modules, IGNITE Onboarding Program and 1-1 coaching

Meet our Team



Monthly Newsletters



## Sales Skills Training

In 2022, the team designed and unveiled an improved Sales Skills learning path to address the onboarding and continuing education needs more thoroughly of client-facing reps.

The aim was to drive best practice behaviors across the newly combined MI Sales & Marketing team, improve the confidence and time efficiency of employees, and thereby accelerate key sales performance indicators that include:

- Faster pipeline build
- Increased first close rate
- Larger ACV & average deal size
- Improved lead generation
- Higher growth for existing customers

*An overview of optional Sales Skills modules that are delivered recurrently in batches of 10-weeks:*

**MI Education – Sales Skills Level 1**

20 courses      10 weeks      2.5 hrs per week      3 roleplays  
2 presentations      Certification

**Prepare**

- Sales Territory Planning
- Book of Business Planning
- Create your Own Personal Brand
- Intentional Activity

**Align**

- LinkedIn Sales Nav
- Qualifying Before Approach
- Prospecting with CIQ Pro

**Relevancy**

- Warm Calling
- Client Email Best Practice
- How to Prepare for Client Meetings

**Trust**

- Trust & Active Listening

**Navigate**

- Pipeline Management

**Evaluate**

- Managing Customer Meetings

**Recognize**

- Building Client Proposals
- Objections Handling

**Signature**

- Contract Negotiations 101
- Contract Creation
- Handover

**Handover**

- Handover

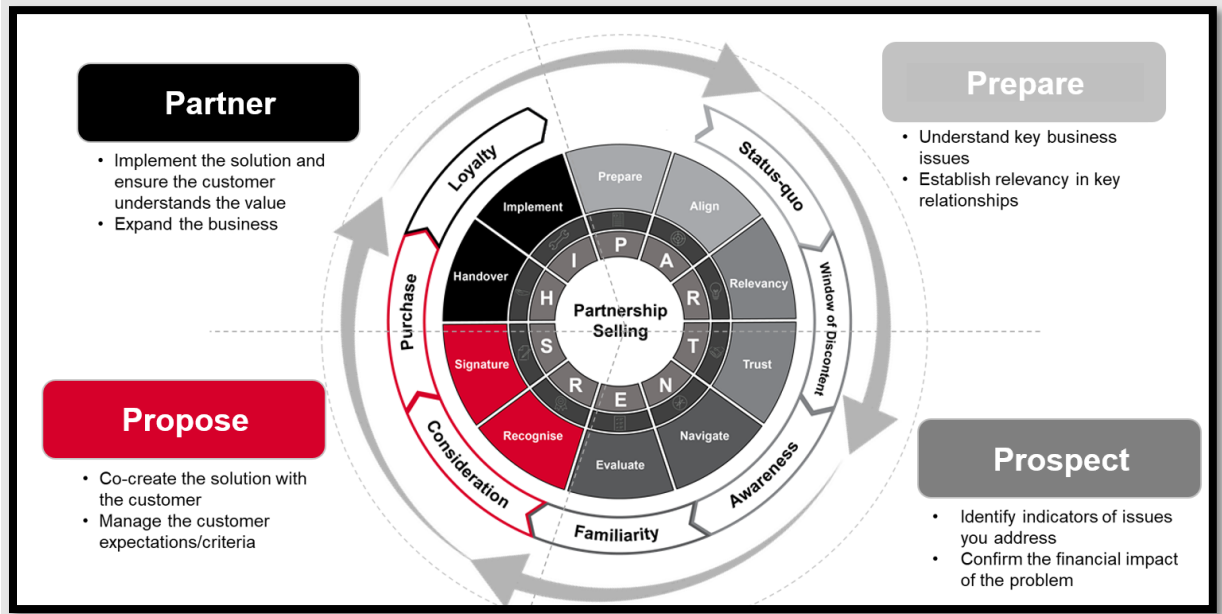
**System Skills**

- Salesforce (Navigation, Reporting, Opps)
- Usage Cube (Walkthrough, Templates)
- EA Tableau (Dashboards)

**Callout 1:** A sales reps training path aligned to their clients buying journey

**Callout 2:** A comprehensive immersion into critical sales skillsets with role plays and presentations

Courses are designed to deliberately support every aspect of the customers’ buying journey. Accordingly, MI Education designed a new sales framework called PARTNERSHIP: a 4-stage end-to-end framework addressing the critical steps in a sales professional’s workflow to support the customers’ journey (see below screenshot depicting this).



Following a thorough learning needs analysis conducted over a 2-month period (using ATD methodology on 20+ top-decile sales leads across the organization), MI Education designed a learning path that addressed essential skillsets they deemed critical in providing a confident and competent customer experience, infused with insightful, persuasive, and well-organized approaches that today’s marketplace expects from sales professionals.

The team leaned on the expertise of those performing frontline reps and their managers to define the behaviors and habits of high performers. The research across these groups, conducted through interviews and brainstorming sessions, shed light on the critical steps a sales rep must undertake to guide a prospect through the journey of becoming a loyal subscriber to one of several MI products.

Those steps were placed into 10 sub-categories:

- Prepare
- Align
- Relevancy
- Trust
- Navigate
- Evaluate
- Relevancy
- Signature



- Handover
- Prepare (for the Renewal)

These were then classified into 4 relevant quadrants:

1. Prepare
2. Prospect
3. Propose
4. Partner

Topics and courses within each of these buckets were then designed. This led to a catalogue of 20 courses wireframed onto an end-to-end process under a world-class framework, helping deliver a predictable, people-orientated sales culture, as well as powerful insights into expected behaviors, customer experiences, and buoyant financial results.

### **IGNITE Onboarding Program**

The team's signature onboarding program, IGNITE, is dedicated to new joiners across the S&P Global Market Intelligence organization and, as the name implies, is designed to fire up their continuous learning journey.

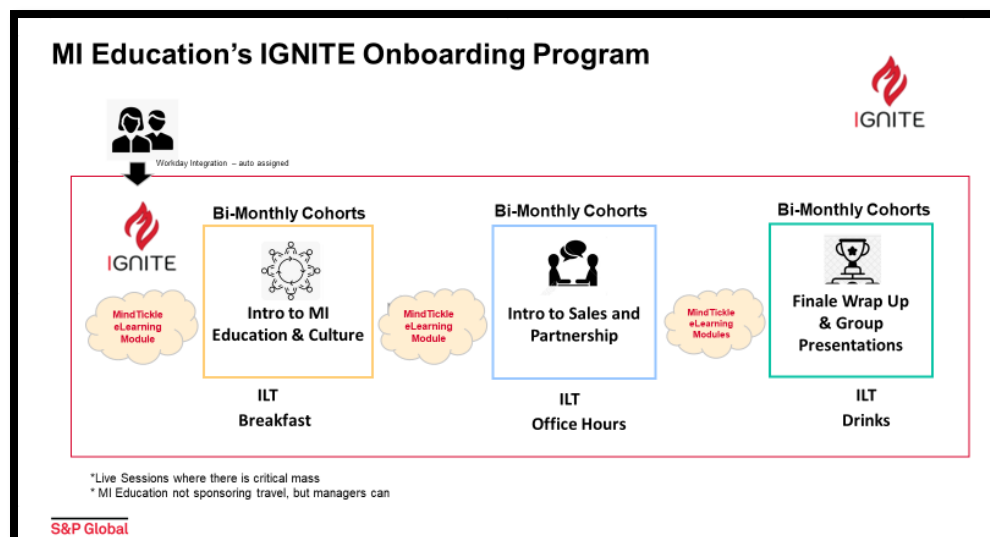
Every new hire into the Sales & Marketing organization is automatically enrolled into IGNITE, and cohorts are formed every 2 months to foster bonds between new hires. The program ensures new joiners are immediately equipped with essential knowledge and information pertaining to the company, including an introduction to the business units, culture, sales methodology, as well as customer segments and personas. This is one of the ways that MI Education has impacted the culture of the division and is seen as an essential part of talent development from an early stage.



Screenshot from an MI Education IGNITE Onboarding Program communication:

The [IGNITE](#) onboarding program features a blended learning approach and incorporates e-learning modules, infographics, and gamification supported by virtual and live in-person sessions where participants meet their peers. The program culminates with group presentations and an onboarding digital badge to reinforce a continuous culture of learning.

Screenshot an MI Education IGNITE Onboarding Program communication highlighting the blended program structure:





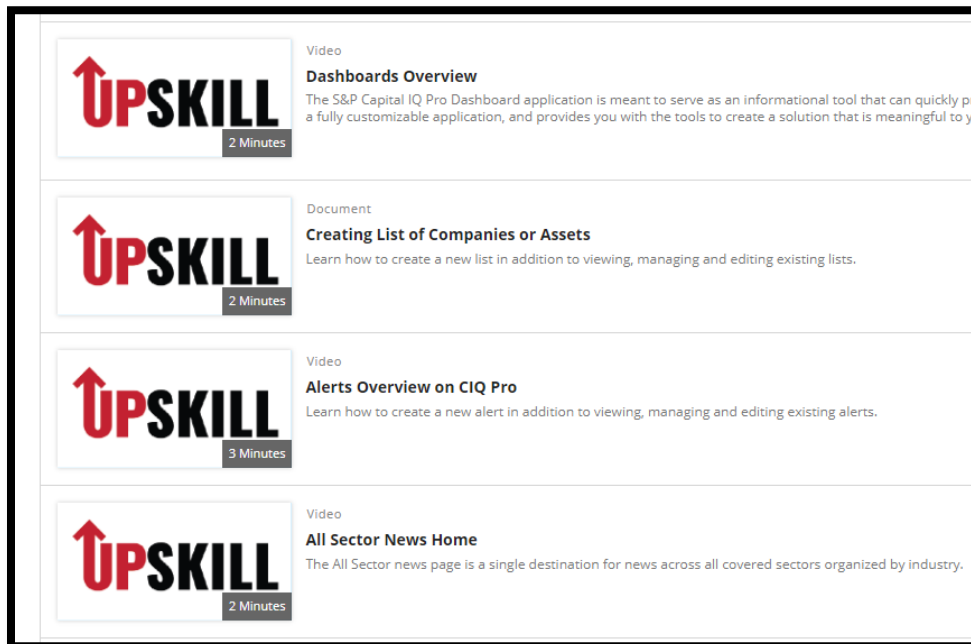
## Upskill: Continuing Education & Bitesize E-Learning Paths

In 2022, MI Education launched curated e-learning paths via the Upskill continuing education program. Recognizing that employees should be able to learn in more flexible ways, this series provides client-facing reps with on-demand foundational knowledge in bite-sized modules to support their “ever boarding.”

Information overload, or what many called the ‘firehose’ approach, would repeatedly surface in learner feedback, and remained top-of-mind as the team sought to re-design new programs as part of the “new normal.” Moreover, as MI Education continued to explore and consider numerous L&D best practices, the concept of bite-sized learning drew more attention. Adult learning theory and behaviorism, with its emphasis on providing students with specific, clear objectives, while considering that learning often improves when smaller portions of information are presented (Liu, Wei, Gao – 2016\*), deeply influenced the design of the Upskill program. Accordingly, the Upskill e-learning Paths provide trainees with more digestible learning modules that are delivered in short, manageable quantities that can be combined and absorbed in flexible ways.

*\*Theory and Practice in Language Studies, Vol. 6, No. 4, pp. 870-877, April 2016*

*Screenshot of one of MI Education’s bite-sized curated e-learning paths:*







## Product Training & Certification Series

Product training at Market Intelligence focuses less on "point-and-click" teaching and more on developing sound foundational knowledge over time, with the help of complementary learning opportunities, real-world client interactions, bespoke coaching, and close collaboration with subject matter experts. We leverage commercial managers, as well as the market and product teams to keep content up to date and ensure that the training and materials are tailored to the audience. Prior to each training course, we review attendee feedback from previous sessions to improve future sessions.

In addition, the MI Education team offers a series of certification programs that equip frontlines with the know-how and confidence they need to hit the ground running.

The certifications, which are available for both sales skills and various products, help trainees further develop their understanding of the fundamentals of selling, as well as the key features and value of the products they endorse when working with clients.

Two important components of those certifications include online written assessments and live/virtual demos and roleplays. Such initiatives reinforce knowledge and equip client-facing reps with the sure-footedness and autonomy they need during their daily interactions with existing or potential customers.

*Screen shot of an MI Education product training communication outlining the steps a trainee must take to complete a certification:*

**Capital IQ Pro Certification**

**Online**

**Learning Xchange**

- > 30 Multiple Choice Questions
- > Theoretical/Navigation Questions
- > Taken on Learning Xchange (Closed Book)

- Administered 1 week after training
- 2 weeks to submit
- 2.5 hr time limit

**Pass Score:**  
80%

**Live Demo**

Pick one scenario

- [Investment Banking/Private Equity >](#)
- [Investment Management >](#)
- [Non-Financial Corporates >](#)
- [Commercial Banks >](#)
- [Insurance >](#)

Demo to 1-2 person panel (PS/Manager)

**HOW TO**   **RUBRIC >**

Demo length: 30-45 minutes  
• 2.5 hr time limit

**Pass Score:**  
Basic in all rubric categories

**How To Prepare**

**CIQ PRO One Pager**

- Shadow at least 1 demo
- Practice with your team
- 1:1 Coaching - Education
- 1:1 Mock Demo - Education

**FAQ**

**CIQ PRO Education Trainers**

Americas   EMEA   APAC

Stefan Misk

MI Education Product Training & Certifications offered in multiple modalities including eLearning and live assessments

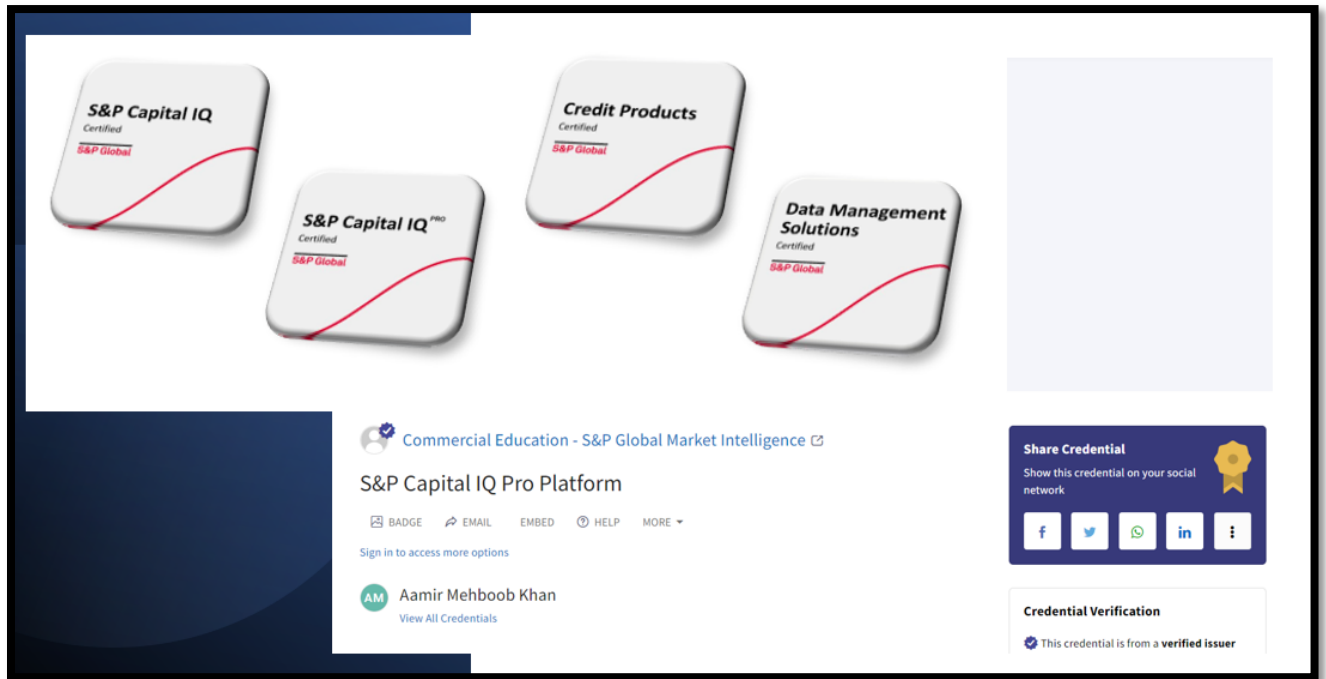
MI Education's Product Certifications include Rubrics which contain criteria, rating scale and scoring criteria

MI Education's Product Trainers service global sales teams across the Americas, Europe and Asia Pacific



Finally, upon successfully completing their product certifications, relevant LinkedIn badges are awarded to trainees, enabling them to publicly share their skill proficiencies in those areas:

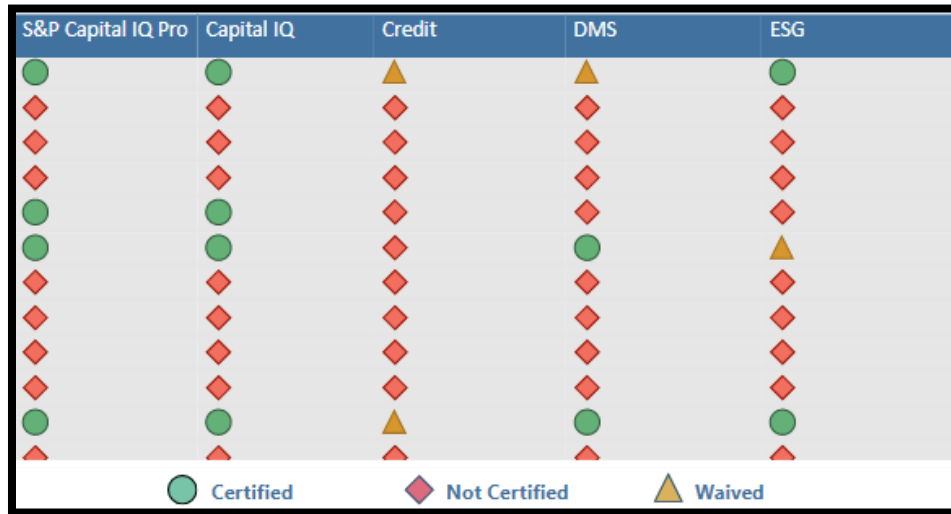
*Screen shot of an MI Education learner certification badge & a media site where they can share their proficiencies:*



Incorporating certification programs into MI Education’s ecosystem has not only introduced consistent and measurable training but has also garnered organization-wide recognition for the team and the programs it offers.



*A screenshot displaying the certification completion status of different individuals via MI Education’s Power BI Dashboards; managers leverage this information to drive certification completions within their teams:*



### Power Skills

One of MI Education's newest program offerings in 2022 was “Power Skills.”

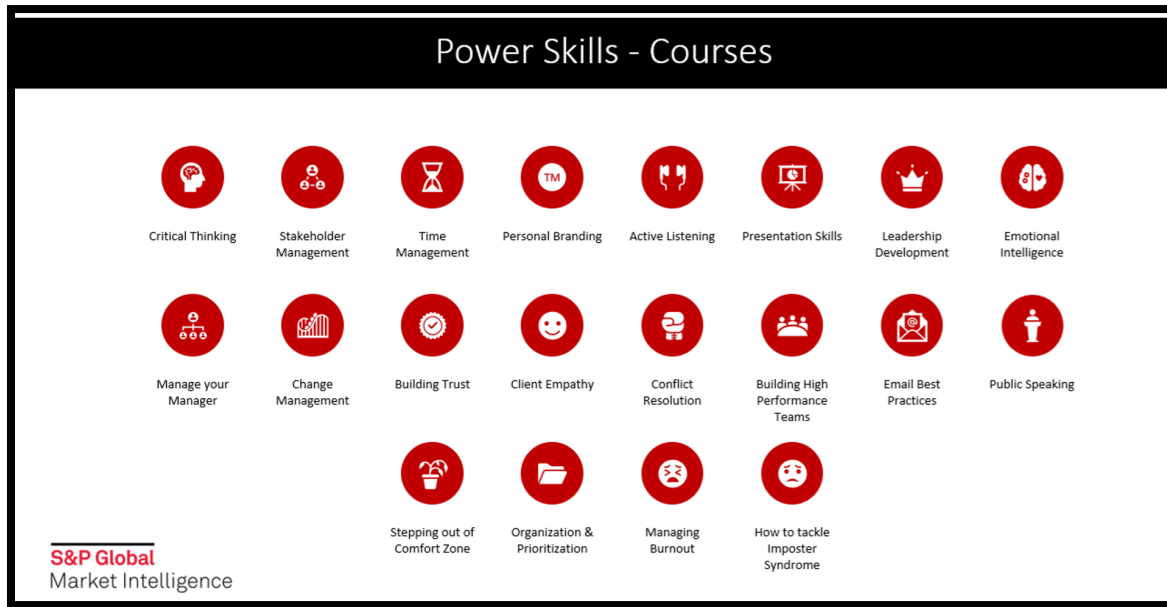
As mentioned, the team runs regularly scheduled stakeholder meetings in which the commercial challenges facing frontline reps are discussed and deeper learning needs assessments are conducted. In one such instance, a conversation took place to understand whether additional Sales Skills training was required for certain teams that were experiencing specific challenges. However, in this instance, the team's analyses led to an unexpected conclusion: a lack of Sales Skills was not seen as the root cause of the problem. Instead, Soft Skills were identified as the core reason for under-performance among certain employees. More focus on personal qualities and traits that impact how frontline reps work was needed. Indeed, top business leaders, industry data, and even market trends all point to the same fact: the next generation of sales and customer-facing workers will need to have a hybrid skillset to compete - a balance of hard skills (such as product knowledge), as well as critical soft skills (such as organization).

To cater to this pressing need, the MI Education team introduced a new learning path called “Power Skills”. This initiative focused on empowering sales representatives by developing and offering professional and interpersonal skills training tailored to their requirements. The content was designed to be delivered in either workshop (classroom)



format or as more personalized one-on-one coaching sessions. Upon completion of the catalogue in Q4 last year, an almost instantaneous impact on demand was noticed, as a testament to the program’s necessity, with 51 sessions of training booked on December for Q1 delivery.

*A snapshot of MI Education’s Power Skills offerings:*



## Systems & Technology

As one of the most frequently delivered programs offered by MI Education, System skills addresses the complex subject of internal tools and systems that frontline reps need to be efficient in their daily jobs. This entails knowledge development around tools such as Salesforce and Usage Cube (a platform for measuring product usage among clients through in-depth analytics).

Training on this subject is a multi-step process giving trainees time to develop their skills and knowledge of these powerful tools and is an important element in the division’s goals of ensuring that tools and technology are properly adopted.

As a result of the System Skills learning program, the following KPIs have seen exponential improvements:

- Increased renewal rates through improved product usage and a growing user base
- Healthier pipeline generation owing to the analysis of key usage trends



- Increased new business close rates through effective pipeline and product trial management
- Improved buying experience for clients due to good opportunity management and shorter sales cycles
- Greater lead generation resulting from well-designed campaigns

*Screenshot of attendance impact from System skills training on “Net Renewal Rate” & “New Business Sales,” highlighting a positive correlation:*



### **Product Enhancement Training (known as “Release Training”)**

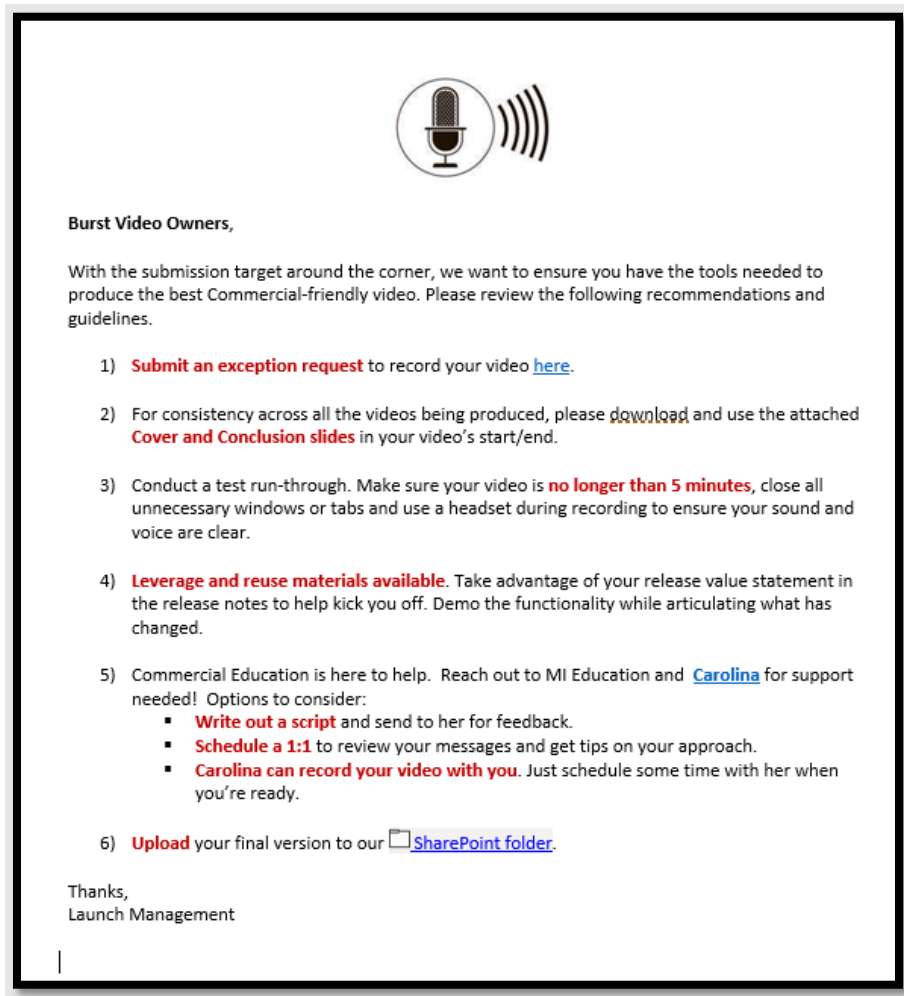
MI Education works with various teams to inform customer-facing employees about the latest product enhancements. Accordingly, MI Education hosts quarterly training sessions for all sales and account management reps. The reps then leverage this information to communicate the value-add to their clients.

To set things in motion, the team attends weekly meetings with the Launch Management, Marketing, and Market Development teams to coordinate, plan, and execute release training. MI Education then assists with logistics such as setting training dates, coordinating with presenters, sending calendar invitations, as well as post-session communications with resources and feedback surveys.

The team works with the presenters and reviews the showcased materials to ensure feedback has been implemented and that learning is standardized across all speakers. In addition, the team advises on best practices for “Burst Videos,” which are quick 5-minute overviews available online and on-demand, that supplement the more comprehensive live training sessions.



*Sample message to “Burst Video” Creators and Content Owners:*



Furthermore, MI Education writes a blog that is posted on the company-wide internal portal, guiding reps to the specific videos they need to watch depending on which client segments they serve.



Sample “Release Value Training” blog / recommended videos:

**22.10 Release Value Training Cycle is Here!**

Watch, replay, and familiarize yourself with all the new functionality being released with **Get 5 Minutes Smart Burst Videos!**

Not sure where to start? See the below recommendations from your Segment Leads or check out the top 5 Cross-Segment recommendations.

Corporate Advisory/Deal Sourcing Workflow	Investment Management Workflow	Financial Corporates Workflow	Commodities Workflow	TMT & Non-Financial Corporates Workflow
Enhanced Macroeconomic Data	Enhanced Macroeconomic Data	Enhanced Macroeconomic Data	Alerts	TMT: MediaCensus
Private Markets & Private Company Expansion	Portfolio Analytics	Banking: US	Desktop / User Managements	Broadband
Document Viewer	Private Markets & Private Company Expansion	Regulatory Depositories	Document Viewer	Document Viewer
Ownership	RatingsDirect	Insurance	Office Tools	Office Tools
Office Tools	Document Viewer	Search	Search	Ownership
		Private Markets & Private Company Expansion		Transactions
<b>Additional Recommendations: EMEA / APAC</b>				
Alerts Portfolio Analytics RatingsDirect				
<b>Cross Segment</b>				
Enhanced Macroeconomic Data Private Markets & Private Company Expansion RatingsDirect Portfolio Analytics Document Viewer				

The MI Education team hosts and records each of those training sessions and uploads the videos to the internal LMS. Post-training, the team gathers intelligence and metrics through Power BI dashboards and provides Product Managers with detailed information





on those completed sessions. Lastly, the team assists with related communications such as blog posts and upcoming Release Training announcements.

MI Education tracks attendance across each course and region which is utilized to refine marketing campaigns and deliver more targeted communications.

*Sample Release Value Training Attendance Report:*



MI Education tracks metrics such as Instructor Rating, Net Promoter Score (NPS), Learning Accretion, and Recommendation Rate. Both the NPS and Recommendation Rate exceed industry average across all courses and regions. Such insights, along with qualitative feedback, are then taken into consideration to refine future release training sessions in partnership with the Product Management and Development teams.



*Sample Release Value Training Scores:*

Offering Name	Instructor Rating (out of)	NPS	Accretion	Recommendation Rate
Financial Corporates Workflow   Commercial Banks/ Insurance/ Real Estate   APAC	4.6	73	1.27	73%
Investment Management Workflow   Americas	4.9	90	1	90%
Corporate Advisory/Deal Sourcing Workflow   IB/PE/Professional Services/NFC   AMER	4.7	70	1.3	70%
Financial Corporates Workflow   Commercial Banks/ Insurance/ Real Estate   AMER	4.6	78	1.11	78%
TMT   Europe, US/Canada	4.9	63	1.25	63%
Private Markets   EMEA & Americas	4.8	75	1.13	88%
Commodities   Global	4.7	86	1.86	86%
Credit Risk Solutions   Americas	4.7	86	1.14	86%
ESG   EMEA & Americas	4.9	86	1	86%
Capital Markets/Corporate Advisory/Deal Sourcing Workflows   IB/PE/IM/Professional Services/NFC   APAC	4.8	100	1.33	100%
Credit Risk Solutions   APAC	4.8	100	1.83	100%
ESG   APAC	4.7	67	1.5	83%
Credit Risk Solutions   EMEA	4.5	50	0	50%
Private Markets   APAC	4.5	100	0.5	100%
Capital Markets   Corporate Advisory/Deal Sourcing Workflow   IB/PE/Professional Services/NFC   EMEA	5	100	3	100%
Financial Corporates Workflow   Commercial Banks/ Insurance/ Real Estate   EMEA	NA	NA	NA	NA

**Learning Events that Galvanize Sales**

On top of MI Education’s standardized programs and curriculum, 13% of the team's offerings in 2022 were ad-hoc collaborations hosted and/or facilitated by MI Education but usually led by other teams or individuals. These strategic sessions were frequently offered to support specific sales efforts, campaigns, and prominent themes impacting the business.

Last year, the MI Education team had the privilege of driving 2 major organization-wide projects that reflected important transitions:

1. The Market Intelligence S&P Global-IHS Markit integration & synergy project
2. The design of the new onboarding program (“IGNITE”) to support the newly combined organization

The aim of the integration initiative was to equip all customer-facing reps with a high-level understanding of the newly combined organization, complimentary data sets, and end-to-end workflow solutions to empower them to unlock more revenue opportunities.

The onboarding project sought to equip new joiners with the basic information they need to propel them into their new jobs with confidence. For both projects, the MI Education team came together to perform lengthy and robust needs analyses, create, and maintain



the project plan, outline clear objectives and milestones, and finally produce the deliverables.

*Screenshot from the MI Education Dashboard - showing some ad hoc collaborations in Q4 (with session names and number of learners):*

Offering Name	# Trainings	Training Hrs	Attendees
2023 Enterprise Price Increase Program	1	1.0	484
RatingsDirect on Capital IQ Pro Launch   Americas & EMEA	1	0.5	400
FS-MI Data Valuations & Analytics   Americas & EMER	1	1.0	388
FS-MI - Know Your Customer & Know Your Third-Party Solutions   Americas & EMEA	1	1.0	330
Workbench Commercialization Training   Americas & EMEA	1	1.0	320
2022 Renewal Price Increase Guidance Training	2	2.0	316
ESG Estimated Scores Release   AMER & EMEA	1	1.0	308

### Coaching by MI Education

The MI Education team comes together to provide coaching sessions for all Sales & Marketing employees through several channels in customized, one-to-one arrangements that complement the product and sales skills classes the team offers.

Following most courses, a coach is assigned to further help the learner test their new skills through scenario-based examples and examine different ways to apply their new-found knowledge. This ensures the learner is more likely to remember, understand, and successfully harness the information absorbed during those courses.

For Sales Reps, Relationship Managers, and Product Specialists this might include:

- How to prepare for a certification
- How to prepare for client meetings
- How to be diagnostic in client meetings
- How to drive momentum after a client meeting
- How to prepare for a renewal negotiation
- How to discuss value-based pricing

For Managers, it might entail:

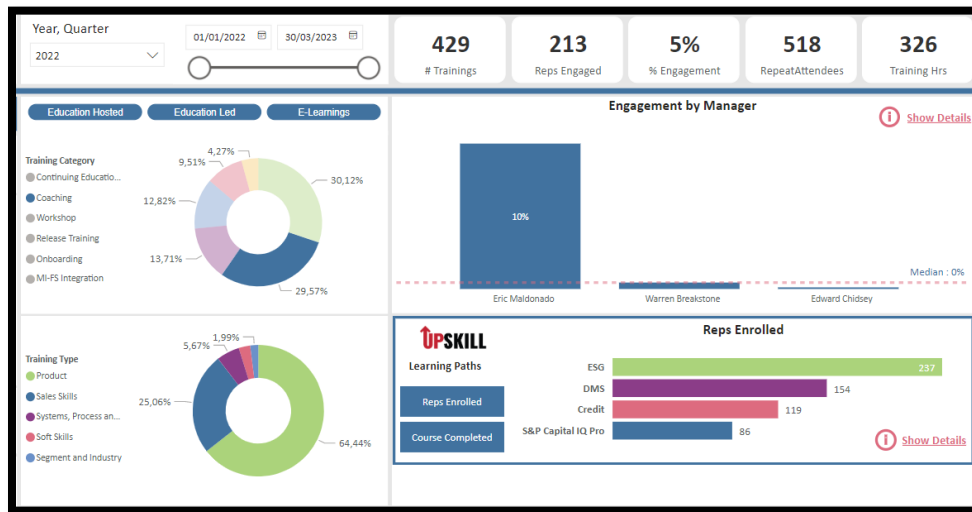
- How to do a skills assessment for your team
- How to develop a learning plan for your team



- How to reinforce key diagnostic concepts
- How to coach for performance
- How to prepare for an internal presentation and drive engagement

Over the course of 2022, close to 32% of MI Education’s training hours were spent on personal one-to-one coaching, focusing on application, practice, and roleplays with the most popular session of that year dealing with how to articulate the value of Environmental, Social & Governance (ESG) data to end customers.


*Screenshot from MI Education’s Dashboard, highlighting the popularity of ESG coaching:*



In addition, MI Education partners with top performers across the organization to assist with coaching, particularly in relation to more complex topics, through an initiative called “Ask a Coach.” By means of an entry form, the team maps the capabilities of every instructor. Then, when a sales rep requests one-on-one training, the request can be promptly escalated to the appropriate coach, ensuring that front line reps get answers quickly.



*Screenshot of the form utilized to map instructor capabilities:*

 **MI EDUCATION**

## Ask A Coach

What is your full name?

What is your email address?

What is your role?

What Business Unit are you in?

**Specialized topics you'll like to coach**  
Please select specific courses that you think you would be great at coaching.

Select

Please specify which product(s) you think you would be great at coaching.


### **Extracurricular Learning & Development:**

One of the ways in which MI Education contributes to tenured frontline sales reps' development is via the provision of recommended reading lists in the monthly online MI Education Newsletter & Sphere site. The team identifies some of the most influential books for sales professionals, including recommendations by "GetAbstract" (an app that provides easy access to summarized expert knowledge and book reviews, helping professionals to apply knowledge efficiently).

Another example of MI Education working as a team to collaborate with stakeholders and sales managers is a quarterly book review initiative where sales managers publish their own reviews and commentaries. This approach is particularly effective in addressing the more tenured learners at MI, who have reached a high degree of competency in their understanding of sales skills but can benefit from advanced content published by world-class experts. This leads to greater engagement from all levels within the MI Sales population.



**An example of a book recommendation on Market Intelligence’s intranet:**

	<p><b>Who Moved the Cheese?</b></p> <p>“Who moved the Cheese?” is an inspiring book about how people and businesses can respond to changing times and situations by learning how to adapt quickly and successfully. The author (Spencer Johnson, MD) uses a parable about two mice and two very small humans that are in search <a href="#">Read More</a></p>
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**MI Education Resources: Calendars and Communications**

To effectively implement all these initiatives throughout the year and ensure learners can conveniently locate and register for upcoming training programs, the MI Education team publishes an Education Calendar on the firm's intranet, Sphere. This calendar is updated in real-time and provides detailed timetables, descriptions, learning objectives, and venues (Zoom details, conference room locations, etc.) for each offering.

The team also broadcasts event updates that display the week’s courses, programs, and other initiatives that are of high importance. This is done through a weekly “This Week in Education” communication which provides another layer of communication. On average, these updates account for 1,700+ views per week.



Screenshot of the Education Calendar:

Education Calendar							
APR 02, 2023 TO APR 08, 2023							
Training Category Final	Sunday Apr 02	Monday Apr 03	Tuesday Apr 04	Wednesday Apr 05	Thursday Apr 06	Friday Apr 07	Saturday Apr 08
Release Training			<b>Release Value Training (program)</b> 23 04 Release Value Training   Corpor - Scheduled Date (Published): 2023-04-04 - Activity Duration (Hours): 0.75	<b>Release Value Training (program)</b> 23 04 Release Value Training   Capital - Scheduled Date (Published): 2023-04-05 - Activity Duration (Hours): 0.75	<b>Release Value Training (program)</b> 23 04 Release Value Training   Financial - Scheduled Date (Published): 2023-04-06 - Activity Duration (Hours): 0.75		
			<b>Release Value Training (program)</b> 23 04 Release Value Training   Capital - Scheduled Date (Published): 2023-04-04 - Activity Duration (Hours): 0.75	<b>Release Value Training (program)</b> 23 04 Release Value Training   Financial - Scheduled Date (Published): 2023-04-05 - Activity Duration (Hours): 0.75	<b>Release Value Training (program)</b> 23 04 Release Value Training   Capital - Scheduled Date (Published): 2023-04-06 - Activity Duration (Hours): 0.5		
Continuing Education (Upskill)	<b>Level 1 Product Training</b> Level 1 Product Training   Product Cert - Scheduled Date (Published): 2023-04-02 - Activity Duration (Hours): 0.5	<b>Level 1 Product Training</b> Level 1 Product Training   Credit Risk - Scheduled Date (Published): 2023-04-03 - Activity Duration (Hours): 3.5	<b>Level 1 Sales Skills</b> Level 1 Sales Skills Training   Prepare - Scheduled Date (Published): 2023-04-04 - Activity Duration (Hours): 1.5	<b>Level 1 Sales Skills</b> Level 1 Sales Skills Training   Evaluate - Scheduled Date (Published): 2023-04-05 - Activity Duration (Hours): 1.5	<b>Level 1 Sales Skills</b> Level 1 Sales Skills Training   Navigate - Scheduled Date (Published): 2023-04-06 - Activity Duration (Hours): 1.5	<b>Level 1 Sales Skills</b> Level 1 Sales Skills Training   Product - Scheduled Date (Published): 2023-04-07 - Activity Duration (Hours): 1.5	
		<b>Level 1 Product Training</b> Level 1 Product Training   Product Cert - Scheduled Date (Published): 2023-04-03 - Activity Duration (Hours): 0.5	<b>Workshop</b> Workshop   Active Listening & Object - Scheduled Date (Published): 2023-04-04	<b>Level 1 Sales Skills</b> Level 1 Sales Skills Training   Book of - Scheduled Date (Published): 2023-04-05 - Activity Duration (Hours): 1.5	<b>Level 1 Sales Skills</b> Level 1 Sales Skills Training   Navigate - Scheduled Date (Published): 2023-04-06 - Activity Duration (Hours): 1.5		
		<b>Level 1 Sales Skills</b> Level 1 Sales Skills Training   Prepare - Scheduled Date (Published): 2023-04-03 - Activity Duration (Hours): 1.5		<b>Workshop</b> Introduction to DISC (Team: Henriert) - Scheduled Date (Published): 2023-04-05 - Activity Duration (Hours): 1	<b>Workshop</b> Introduction to DISC (Team: Carolyn) - Scheduled Date (Published): 2023-04-06 - Activity Duration (Hours): 2		
		<b>Workshop</b> Workshop   Time Management - Scheduled Date (Published): 2023-04-03 - Activity Duration (Hours): 1.5			<b>Workshop</b> Workshop   Time Management - Scheduled Date (Published): 2023-04-06 - Activity Duration (Hours): 1		
Workshop		<b>Workshop</b> ChartIQ Solution Overview   APAC - Scheduled Date (Published): 2023-04-03 - Activity Duration (Hours): 1	<b>Level 1 Sales Skills</b> Level 1 Sales Skills Training   Trust & - Scheduled Date (Published): 2023-04-04 - Activity Duration (Hours): 1.5	<b>Workshop</b> ChartIQ Orientation to SPML Salesford - Scheduled Date (Published): 2023-04-05 - Activity Duration (Hours): 1	<b>Workshop</b> ChartIQ Orientation to SPML Salesford - Scheduled Date (Published): 2023-04-06 - Activity Duration (Hours): 1	<b>Workshop</b> 1:1 Coaching Session   Overview of C - Scheduled Date (Published): 2023-04-07 - Activity Duration (Hours): 1	
		<b>Workshop</b> Workshop   Intro to Sales Mindset   JA - Scheduled Date (Published): 2023-04-03 - Activity Duration (Hours): 1	<b>Level 1 Sales Skills</b> Level 1 Sales Skills Training   Trust & - Scheduled Date (Published): 2023-04-04 - Activity Duration (Hours): 1.5				

The curriculum that MI Education creates for its learners is guided by the Education Course Catalog which was built as the central nervous system of the team. It lists all the courses for both live/virtual classes and online e-learning. It can be accessed through the Market Intelligence’s Power BI account and any employee can swiftly request a training session, from an assortment of options and choices, by clicking on the relevant topic name.

Moreover, it enables learners to view the full course offerings categorized by modality (instructor-led, self-paced e-learning, etc.), training type, brief descriptions, learning objectives, and the KPI impacted by the course.

For self-paced learning, selections are linked to the LMS system. For instructor-led courses, these auto-populate into a training request form.





Screenshot of the MI Education Course Catalog:

The screenshot shows the MI Education Course Catalog interface. At the top, it says "Education Catalogue | Data updated 4/11/23" and has a search bar. Below that are navigation options: "Share", "Export", "Chat in Teams", "Get insights", and a refresh button. There are five filter dropdowns: "Category" (All), "Sub Category" (All), "Training Type" (All), "Topic" (All), and "Business Impact" (All). Below these are two buttons: "Education Led" and "Self-Paced E-Learning", followed by a count of "365" and a search prompt "Tell us what you're looking for". The MI EDUCATION logo is in the top right.

A yellow banner below the filters reads: "Click on a course name below to subscribe for an e-learning or request an Instructor-led coaching session or a workshop for your team".

Course Name	Category	Training Type	Description	Learning Objectives
<a href="#">Sustainability on CIQ Pro - Business Involvement Screening</a>	Continuing Education (Upskill)	Product	The video clip aims to educate learners on how to navigate the Business Involvement Screens available on CIQ Pro.	After watching this video clip, you will be able to: Understand Business Involvement Screens Learn how to navigate Business Involvement Screens on CIQ Pro Be able to position Business Involvement Screens on CIQ Pro to clients.
<a href="#">Sustainability on CIQ Pro - Carbon Footprint Report</a>	Continuing Education (Upskill)	Product	The video clip aims to educate learners on how to navigate the Portfolio Analytics Carbon Footprint report on CIQ Pro.	After watching this video clip, you will be able to: Understand the Carbon Footprint Report Learn how to navigate Carbon Footprint Report on CIQ Pro Be able to position Carbon Footprint Report on CIQ Pro to clients
<a href="#">Sustainability on CIQ Pro - Environmental Footprint Report</a>	Continuing Education (Upskill)	Product	The video clip aims to educate learners on how to navigate the Portfolio Analytics Environmental Footprint report on CIQ Pro.	After watching this video clip, you will be able to: Understand Environmental Footprint Report Learn how to navigate Environmental Footprint Report on CIQ Pro Be able to position Environmental Footprint Report on CIQ Pro to clients.
<a href="#">Sustainability on CIQ Pro - How to Upload a Portfolio</a>	Continuing Education (Upskill)	Product	The video clip aims to educate learners on how to upload a Portfolio on CIQ Pro.	After watching this video clip, you will be able to: Understand how to upload a Portfolio on CIQ Pro
<a href="#">40 second CIQ Pro Promo</a>	Continuing Education (Upskill)	Product	This short recorded video provides a 40 second promo on the CIQ Pro platform	"After completing this module, you will be able to: • Articulate the value that Capital IQ Pro offers to the market"
<a href="#">5 Ways to Flip a Moody's GRATE client to PFAST</a>	Continuing Education (Upskill)	Product		
<a href="#">6 Reasons Why PFAST is a Breakthrough</a>	Continuing Education	Product		

## Measurable Benefits

### The MI Education In-House Analytics Suite

The MI Education team has built an in-house analytics suite (through Power BI Dashboards) that greatly facilitates critical analysis of the content and delivery of its learning programs. This ensures continuous improvements along the way, resulting in courses that are always relevant and timely as products and markets perpetually evolve.

All programs are aligned to the division's key strategic pillars, ensuring that company strategy is consistent with learning and development, and that MI Education is an essential component in cultivating a culture of continuous learning. The division has very clear revenue and retention targets, and MI Education is measured on its ability to enable reps to achieve those targets.



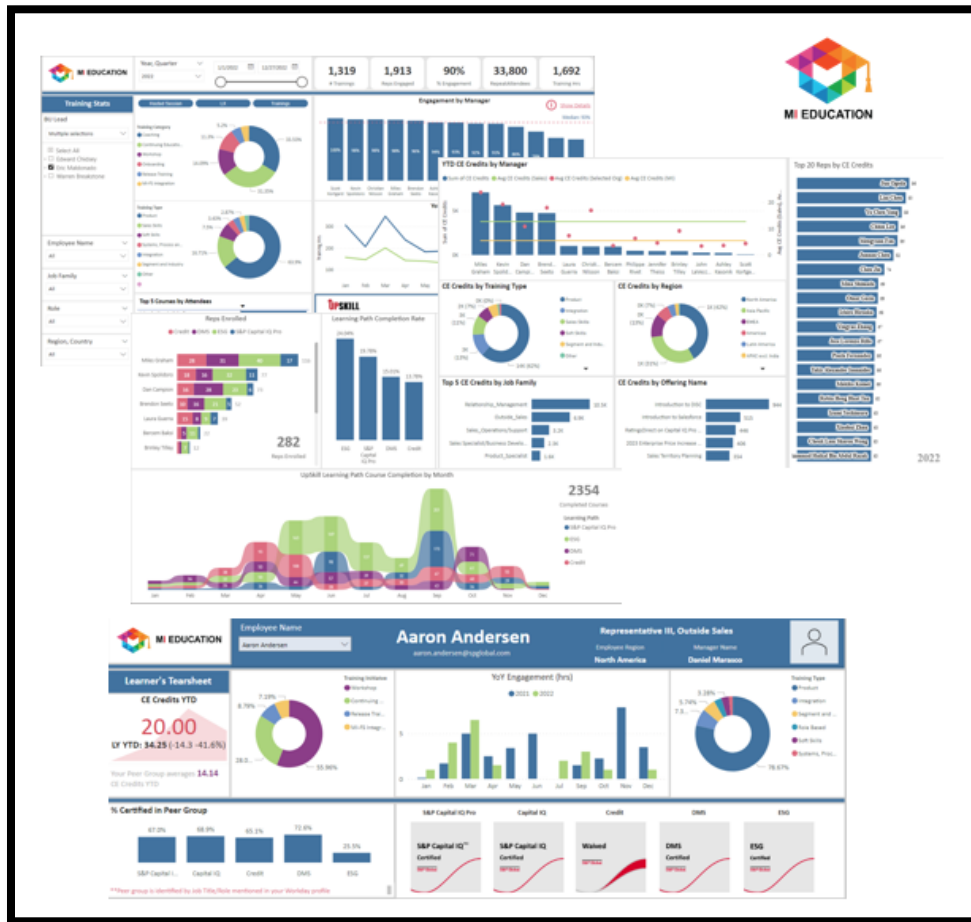
The team also sets high standards for themselves in the form of KPIs that sit above industry standards and is rigorous in the collection and analysis of data on those KPIs. Furthermore, continual engagement with trainees and stakeholders helps create a shared sense of ownership over learning, with a common view on program effectiveness, efficiency, and impact on business performance. The team can then focus on the right areas and produce the right content with minimal delays or ambiguities.

Analyzing the effect of training on business results is key to making learning content more relevant and engaging. Consequently, the team's analytics look at performance trends for different sales teams and highlight the programs that demonstrate high impact and tangible outcomes.

Additionally, MI Education uses surveys to assess how trainees feel about the subject matter and the instructor's teaching methods. KPIs like "Net Promoter Score" and "Learning Accretion" are tracked to gauge the learners' sentiments and increase in level of knowledge after attending a program. Also, program-level analyses are provided to reflect levels of engagement from the audience.

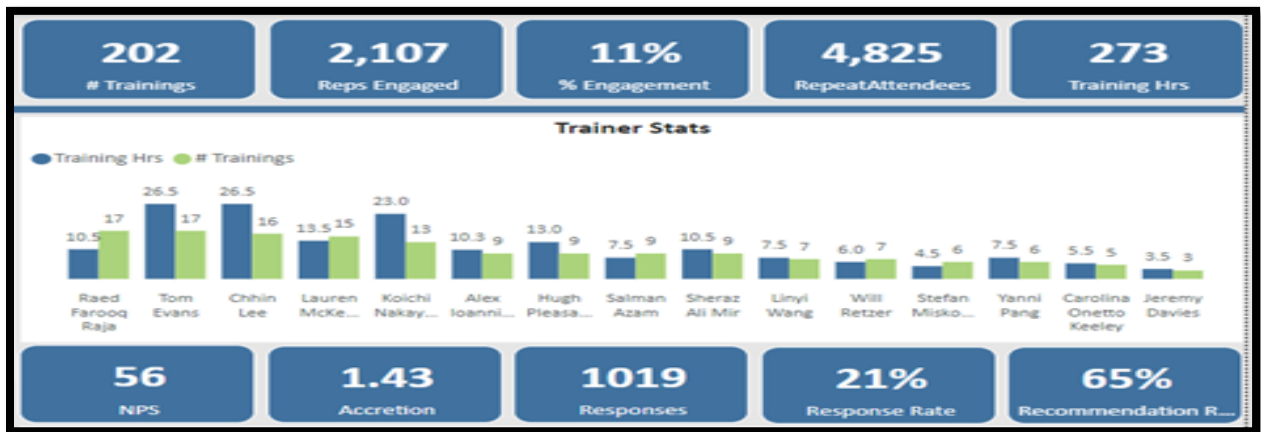
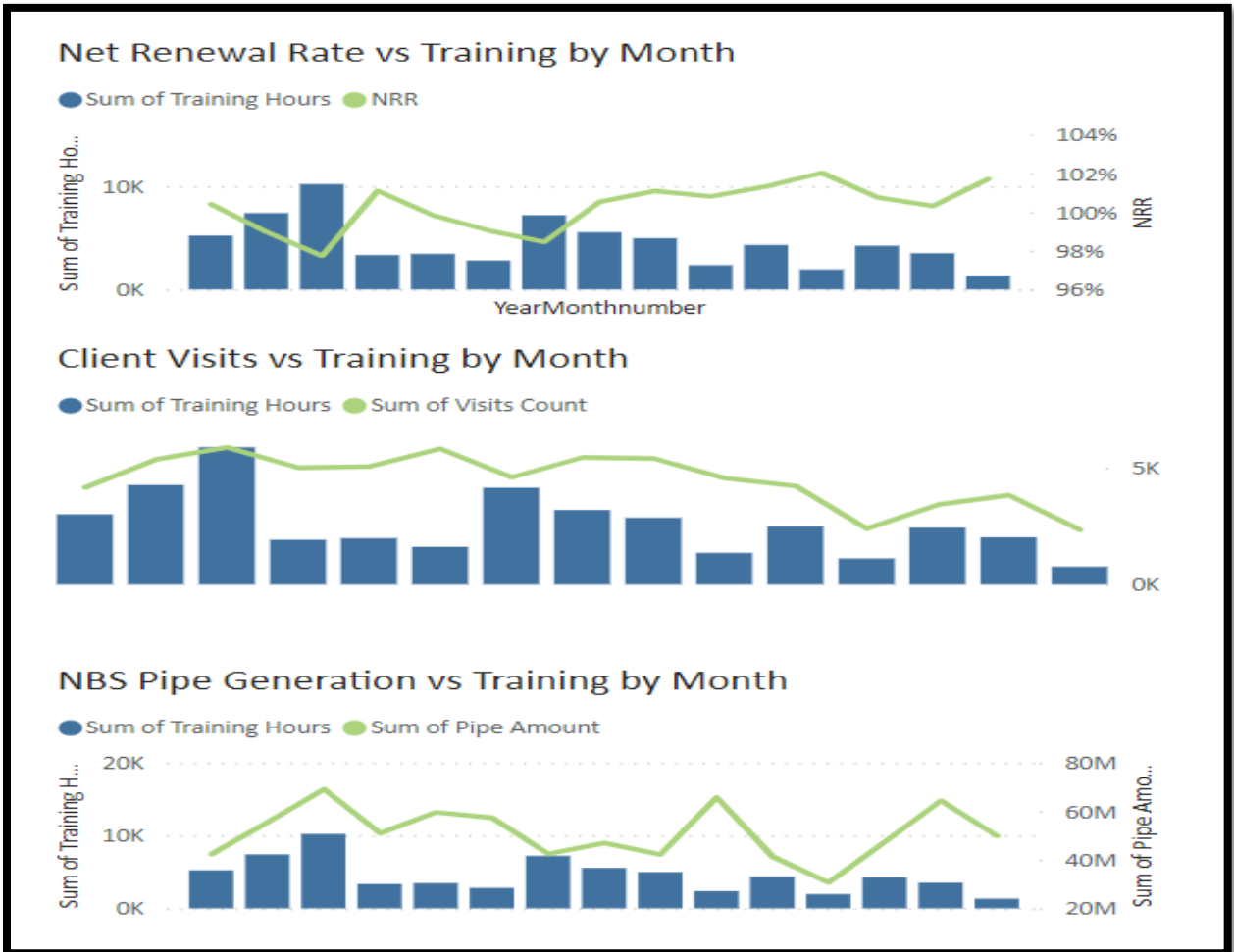


Screenshots displaying different analytical dimensions (employee level, training level, program level, Y-o-Y comparisons, etc.) on each KPI:



These analytics help MI Education answer questions like:

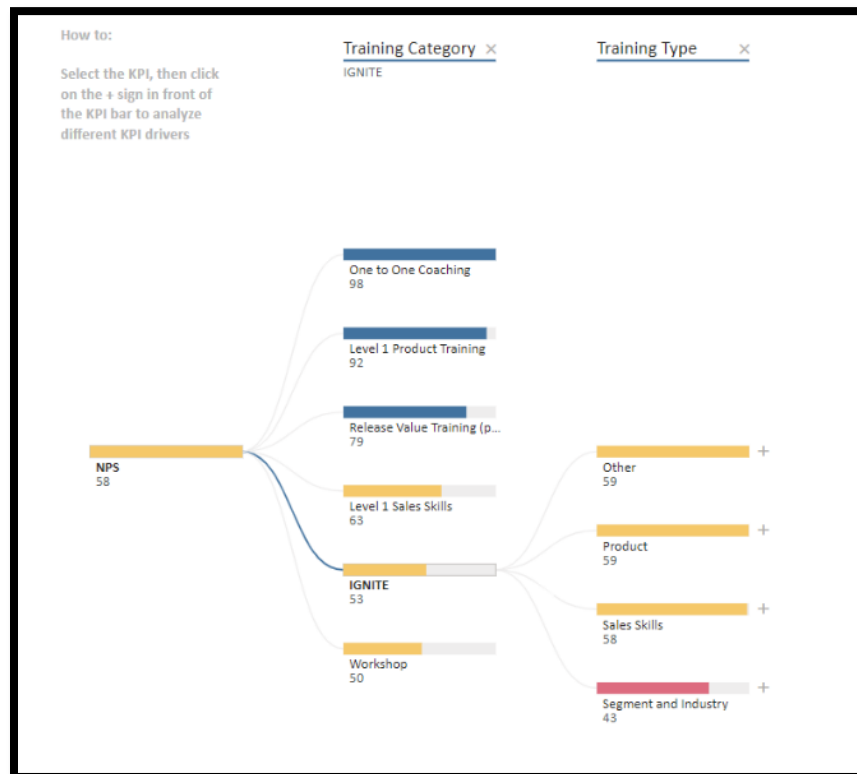
- How is learning path engagement trending over time?
- Which courses are most popular vs least popular?
- Which teams have earned the highest CE credits to date?
- Where are the gaps in certifications that the team can proactively address?
- What suggested courses can MI Education surface to a learner based on what their peer group has taken, or their role suggests they should take?



These intuitive analytical tools provide the Education Specialists with meaningful insights and flexibility by allowing them to analyze the KPI drivers from different angles and through diverse contributing variables.



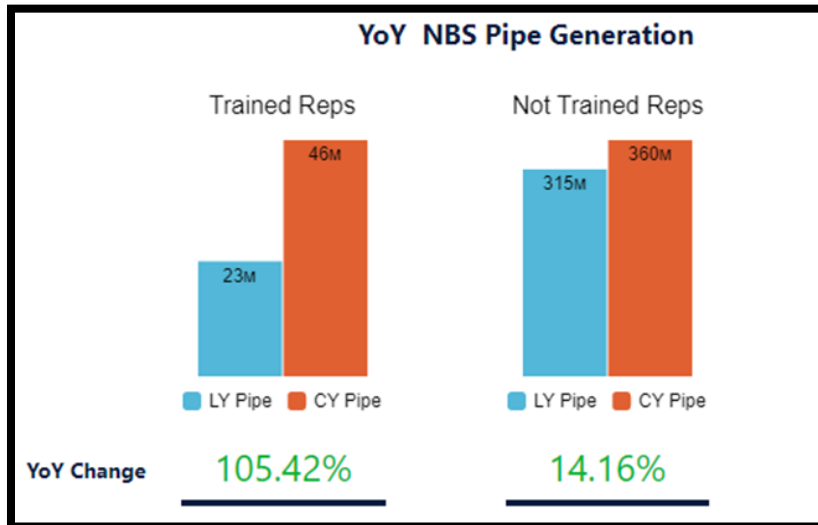
Employee's Email Address	Employee Name	Program Completion	Region Ro
christy.keaney@spglobal.com	Christina Keaney	100.0%	Americas
eleyse.peacock@spglobal.com	Eleyse Peacock	100.0%	EMEA
emily.ohara@spglobal.com	Emily O'Hara	100.0%	Americas
zachary.anderson@ihsmarkit.com	Zachary Anderson	100.0%	Americas
chris.delsandro@spglobal.com	Christopher Delsandro	91.7%	Americas
eleanor.gawthorpe@ihsmarkit.com	Eleanor Gawthorpe	91.7%	EMEA
manaf.alwan@spglobal.com	Manaf Alwan	91.7%	Americas
mathieu.arzoine@spglobal.com	Mathieu Arzoine Lafages	91.7%	EMEA
robyn.goldberg@ihsmarkit.com	Robyn Goldberg	91.7%	Americas
sam.suayan@spglobal.com	Sam Suayan	91.7%	Americas
stewart.moore@spglobal.com	Stewart Moore	91.7%	Americas
alexa.robertson@spglobal.com	Alexa Robertson	83.3%	Americas



A key element of these analytics is that they are not just for use by MI Education but are also made readily available for sales managers to track the degree to which their teams are developing their knowledge and expertise of different products and sales skills, and how that upskilling directly translates to business objectives. For example, sales managers can use these analytics to see that among those who took one-on-one coaching in 2022 (after joining the firm the previous year), a 105% increase in Pipeline Generation was recorded vs. only 14% for those who didn't attend any coaching.

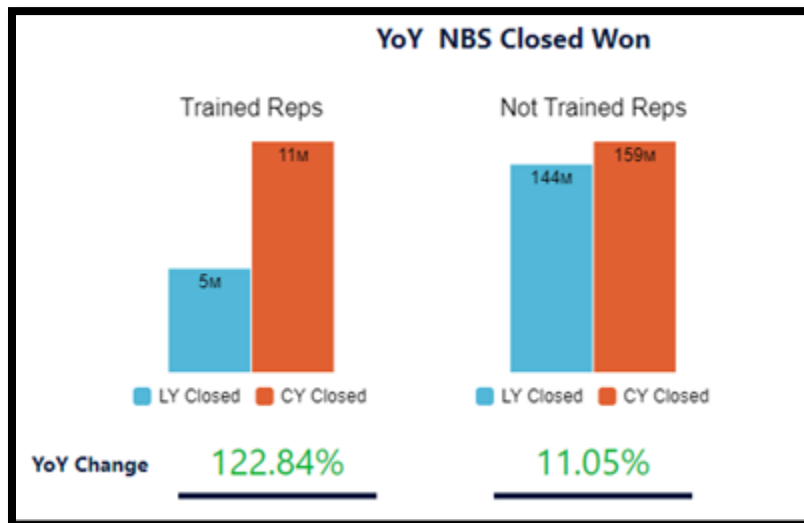


Screenshot of year-over-year Pipeline Generation improvement resulting from MI Education Coaching:



Sales managers can see a similar trend for closed business rates, with those who attended MI Education coaching in 2022 seeing a 122% increase in their Closed Won rate vs. only 11% for those who didn't attend coaching.

Screenshot of year-over-year improvements relating to Closed Deals impacted by MI Education Coaching:





## Overall

### MI Education is a Connector

Market Intelligence is a \$4-billion division of S&P Global and is organized into seven distinct business units. With a diverse client base and solutions encompassing roughly 300 individual products, it's easy for the businesses to become overly siloed. MI Education is thus used as a common language among the company's teams to help unite stakeholders across the organization under a shared culture of learning. The team aligns its Education Specialists to cover specific businesses in which they have expertise, which helps ensure each business has a single point of contact for their Go to Market strategies. This structure helps more effectively manage and unite the stakeholders, many of whom would otherwise typically operate only within their own siloes, and it also allows for the scaling of programs across S&P Global.

This was never more important than during the 2022 merger of S&P Global and IHS Markit. Research on the topic of "why mergers fail" is prevalent, including Harvard Business Review's 2018 study\* of the Amazon/Whole Foods transaction that cited culture as a key factor in their rocky start. In another study\*\*, culture was found to be the cause of a full 30% of failed integrations.



\*Michele Gelfand, Sarah Gordon, Chengguang Li, Virginia Choi, Piotr Prokopowicz, "One Reason Mergers Fail: The Two Cultures Aren't Compatible," Harvard Business Review, October 2018.

\*\* Isaac Dixon, "Culture Management and Mergers and Acquisitions," Society for Human Resource Management case study, March 2005.

Through this merger experience, the team learned that one way to unite disparate cultures is by catering to a common thirst for knowledge. With 1,700 sales reps of different backgrounds and working styles coming together, MI Education was able to use its position in the organization to its advantage by working across the two businesses to promote a better understanding of the new shared identity.



*A snapshot of the business units that MI Education works with and conducts training programs for:*

Training By Business Unit		
Credit & Risk Solutions	Data, Valuation & Analytics	Research, Advisory & Specialty Solutions
<a href="#">Links &amp; Training</a> +	<a href="#">Links &amp; Training</a> +	<a href="#">Links &amp; Training</a> +
Software Solutions	Network & Regulatory Solutions	Desktop & Channel Solutions
<a href="#">Links &amp; Training</a> +	<a href="#">Links &amp; Training</a> +	<a href="#">Links &amp; Training</a> +
Markit Digital	Sustainability	Mobility
<a href="#">Links &amp; Training</a> +	<a href="#">Links &amp; Training</a> +	<a href="#">Links &amp; Training</a> +
Panjiva	Private Markets	
<a href="#">Product Management</a> +	<a href="#">Product Management</a> +	
<a href="#">Case Studies</a> +	<a href="#">Case Studies</a> +	
<b>Program Offerings</b> Commercial Education offers more than 153 blended-learning experiences for onboarding & ongoing education needs. Our signature onboarding program is called <a href="#">ever-board</a> .	 <b>UPSKILL</b> Upskill is our continuing education program that provides sales and marketing...	 <b>IGNITE</b> IGNITE is MI Education's signature onboarding program <a href="#">click here to REGISTER</a>

### MI Education’s Learning Paths Are Aligned to Company Strategy

MI Education has also learned that building its upskilling programs around the company’s strategic pillars is essential to gaining adoption. This alignment ensures that it develops programming that is both relevant and actionable to the frontlines. For example, Credit & Risk Solutions is both a Strategic Pillar and a Learning Path. MI Education surfaces this learning path on Sphere to promote awareness of its strategy, and continually enhances the path as market conditions and the Go to Market strategy evolves. This tight alignment between learning and business strategy has become part of the company’s DNA and is one of the reasons that MI Education’s enthusiastic support from S&P Global’s CEO and Head of Sales remains so strong. Moreover, the Head of MI Education is a direct report to the Head of Sales, which is further validation of the importance of learning throughout this business.

### The Future Outlook

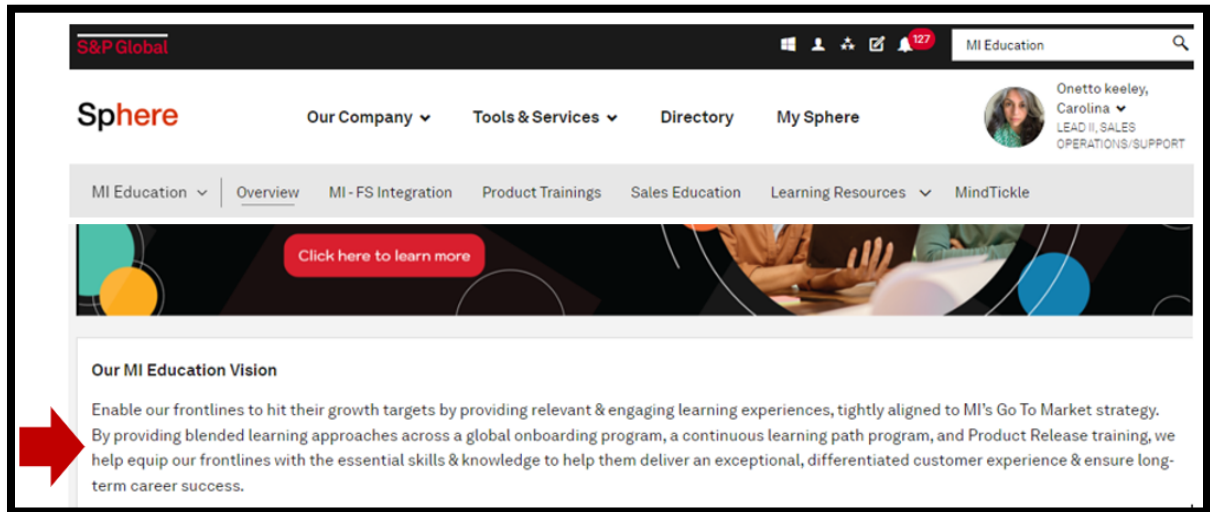
MI Education benefits from strong organizational sponsorship at the most senior levels, where upskilling is a key element of S&P Global’s ability to compete in a challenging market and retain top talent. To this end, MI Education’s role in “ever-boarding” its people (and connecting a complex, global enterprise under a shared culture of learning) is never finished. MI Education’s goal is to develop talent, with each Education Specialist continually upskilling





themselves by embracing the newest thinking in instructional design, to remain a best in class learning team.

### The MI Education team’s vision featured on S&P Global’s Sphere site:





Brandon Hall Group

# EXCELLENCE AWARDS 2023

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