



GTreasury Slashes Onboarding Time by 90% with Digital-First Support Training

GTreasury and LearnUpon
Best New Hire Onboarding Program
November 2024



Company Background



Company-at-a-Glance	
Headquarters	Buffalo Grove, Illinois
Year Founded	1986
Revenue	\$50 million+
Employees	300+
Global Scale (Regions that you operate in or provide services to)	GTreasury is a global company headquartered in Buffalo Grove, Illinois (USA), and with offices in London (UK), Geneva (Switzerland), Sydney (Australia), and Singapore.
Customers/Output, etc. (Key customers and services offered)	GTreasury helps organizations by connecting treasury and digital finance operations through a world-class SaaS treasury and risk management platform and integrated ecosystem where cash, debt, investments, and exposures are seamlessly managed within the office of the CFO. GTreasury delivers intelligent insights, while connecting financial value chains and extending workflows to third-party systems, exchanges, portals, and services. Headquartered in Chicago, with locations serving EMEA (London) and APAC (Sydney and Manila), GTreasury’s global



	community includes more than 800 customers and 30+ industries reaching 160+ countries worldwide.
Industry	Financial Services
Stock Symbol	N/A
Website	https://gtreasury.com/

Company Background



LearnUpon

Company-at-a-Glance	
Headquarters	Dublin
Year Founded	2012
Revenue	Less than \$50 million
Employees	250+
Global Scale (Regions that you operate in or provide services to)	LearnUpon is a global company with an HQ in Dublin (IE), and offices in Philadelphia (USA), Salt Lake City (USA), Sydney (AUS), and Belgrade (SRB).
Customers/Output, etc. (Key customers and services offered)	<p>LearnUpon partners with over 1,400 customers to champion simple, learner-centric experiences for over 19 million learners across over 35 countries globally.</p> <p>With 290+ employees and offices in Dublin, Philadelphia, Salt Lake City, Belgrade, and Sydney, LearnUpon LMS makes it easy for businesses to deliver learning that impacts what matters: performance, retention, and growth.</p>
Industry	Technology & Software
Stock Symbol	N/A
Website	https://www.learnupon.com



Budget and Timeframe

Budget and Timeframe	
Overall budget	N/A
Number of (HR, Learning, Talent) employees involved with the implementation?	8
Number of Operations or Subject Matter Expert employees involved with the implementation?	6
Number of contractors involved with implementation	0
Timeframe to implement	7 months
Start date of the program	May 2022

Fit to the Needs

GTreasury helps organizations reach their potential by connecting treasury and digital finance operations through a world-class SaaS treasury and risk management platform and integrated ecosystem where cash, debt, investments, and exposures are seamlessly managed within the office of the CFO.

GTreasury found itself facing several challenges which prompted the need for a revamped approach to onboarding Global Support Analysts. One critical issue was the lag in customer response time, notably evident from discussions with GTreasury's Customer Advisory Board. To address this, GTreasury recognized the necessity of increasing personnel to improve response times and bolster customer satisfaction.

Continuous hiring added to the urgency of enhancing the onboarding process with the team experiencing a lot of turnover and transitions to different departments, requiring GTreasury to backfill positions. The company sought to streamline the onboarding timeline, aiming to shorten the period required for them to become productive contributors to the team. At that time, it took 6 to 9 months to train new hires to a point where they were successfully resolving client support tickets. Their goal was to reduce this to between 3 and 6 months.

The prevalence of remote work further complicated the onboarding process, with the majority of GTreasury's workforce operating remotely. This necessitated an effective strategy for onboarding employees without the luxury of face-to-face interaction.



GTreasury's previous onboarding approach was characterized by its manual and ad-hoc nature. The lack of a systematic process resulted in varied experiences for new hires, depending on the availability of HR personnel and managers. This inconsistency highlighted the need for a more structured and comprehensive onboarding program.

Employee feedback, particularly through the Employee Net Promoter Score (NPS), underscored the significance of training in the onboarding process. The absence of structured training contributed to prolonged onboarding periods and diminished employee productivity.

To facilitate this focus, the business made a strategic investment in its Global Learning Services group which would be responsible for setting up the learning infrastructure for employee onboarding, and other internal and external learning programs.

"In an environment where we plan to grow by more than 400% over the next 5 years, people and effective onboarding are a critical factor to achieving that goal. At GTreasury, our Global Learning Services group was a strategic investment to ensure we could have the talent in place with the right knowledge to achieve our goals." - Renaat Ver Eecke, CEO of GTreasury

Overview

Led by the Global Learning Services team, GTreasury embarked on a comprehensive overhaul of its onboarding program to address the identified challenges and meet the evolving needs of the organization.

Recognizing the critical importance of efficient onboarding in driving business success, GTreasury sought to streamline the process, reduce onboarding times, and ensure new hires were equipped with the necessary knowledge and skills to contribute effectively from the outset. Central to this transformation was the adoption of LearnUpon's Learning Management System (LMS), which provided a robust platform for delivering and managing the onboarding curriculum.

"The COVID-19 pandemic forced us to transition from a mostly office-based to a mostly remote-based team model. We had to rethink how we hire, onboard, and grow our team. Our New Hire Onboarding program, built on LearnUpon's intuitive LMS platform, has been critical in speeding up the productivity of new team members." - Riyaz Adamjee, VP, Global Learning Services at GTreasury

LearnUpon's LMS facilitated the structured delivery of the onboarding program, allowing GTreasury to organize content into distinct paths tailored to the needs of different employee roles. Through Path 1, new hires were introduced to GTreasury's history, IT processes, and security protocols.



Path 2 provided an in-depth exploration of the treasury industry, while Path 3 focused on functional onboarding, equipping support analysts with the tools and knowledge needed to excel in their roles. The flexibility and scalability of LearnUpon's platform enabled GTreasury to adapt the program to accommodate remote work dynamics, ensuring seamless onboarding experiences for employees irrespective of their location.

Global Client Support Onboarding

GARVIS

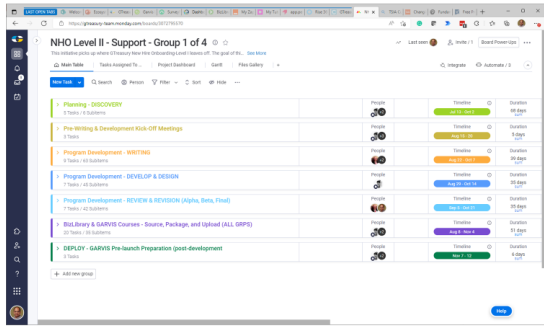
- Learning Paths = 3
- Courses = 22
- Modules = 35


Live Sessions

- Touchbase with Manager and Team Leads = 12

Primary Goal

- Reduce Time-to-Value from 6-9 months to 3 months





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Image: Taken from an internal presentation deck detailing the program

By leveraging LearnUpon's analytics and reporting features, GTreasury gained valuable insights into employee progress and engagement, allowing for continuous improvement and refinement of the onboarding process. Real-time tracking of learning outcomes enabled the Global Learning Services team to identify areas for enhancement and tailor the curriculum accordingly.

Goal 1: Reduce Onboarding Time by 30-50%

The primary goal of the revamped program was to reduce the onboarding time from 6-9 months to 3-6 months, enabling new hires to integrate more quickly into their roles and contribute to the team's objectives sooner.

Recognizing the enthusiasm of new hires, the program allowed for flexibility in pacing while ensuring thorough understanding and retention of training materials. From the initial rollout, GTreasury managed to reduce the onboarding time for the Support Analysts to 1 month. Based on feedback from the pilot group and content adjustments, they have since reduced it to 3 weeks, enabling new hires to complete the curriculum that previously took 6 to 9 months.



"One of the biggest impacts I have seen from our Global Learning Services group is on our Global Support group. GTreasury needed to ramp up the investment in that group due to our accelerated growth. Traditionally, that role took over 6 months to get onboard. After our new onboarding process and tools, we were able to get that down to about 1 month. This ultimately empowered that group to get our average time to close a ticket down by more than 50%." - Renaat Ver Eecke, CEO of GTreasury

Goal 2: Reduce Time-to-Value by Establishing Productivity Milestones

The team embarked on a journey to define what effective onboarding looks like, including the necessary courses, content, and interactions, such as assignments and touchpoints where new hires could meet with their team leads or manager to verify their learnings and ask questions.

The redefined onboarding program was structured into three distinct paths, each designed to provide new hires with the necessary knowledge and skills to excel in their roles:

- Path 1: HR Orientation: This path focused on introducing new hires to GTreasury's history, acquisitions, IT processes, and security awareness. In fact, in some cases, we've reduced it to less than a day, allowing new employees to quickly start their role-based onboarding.
- Path 2: Treasury Industry History: Providing an understanding of the treasury industry's evolution and dynamics.
- Path 3: Functional Onboarding: Once the paths above are completed, which used to take between 1–2 weeks and now takes 1-2 days, employees can quickly start their role-based onboarding. Offering training on team structures, roles and responsibilities, system usage, incident identification, and scenario walkthroughs for Global Support Analysts.

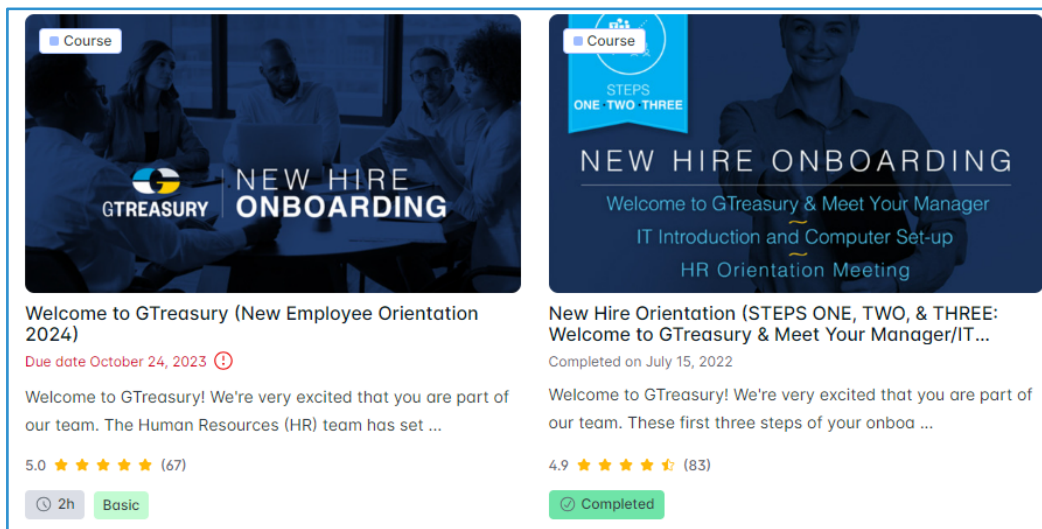


Image: Examples of GTreasury HR Orientation Onboarding Courses in LearnUpon

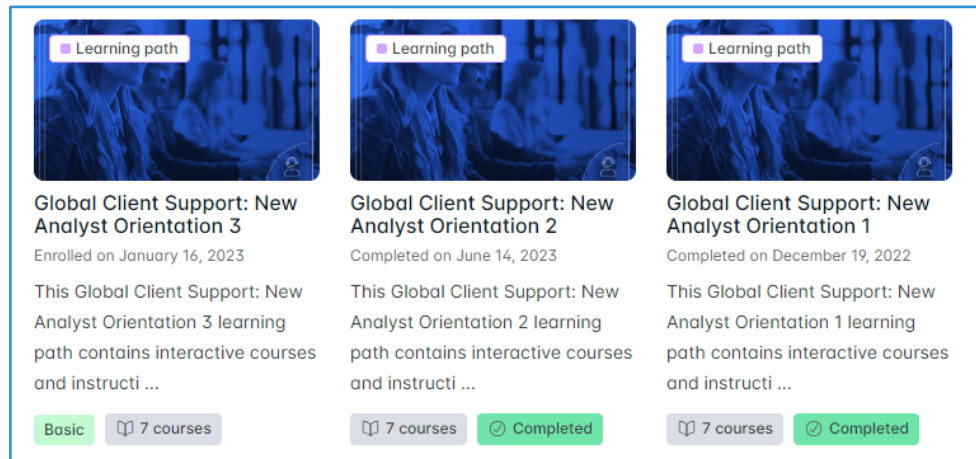


Image: Examples of GTreasury Functional Onboarding Courses in LearnUpon

Throughout the program, emphasis was placed on ensuring that new hires reached productivity milestones at each stage, enabling them to transition smoothly into their roles and contribute meaningfully to the team's objectives.

Previously, new hires couldn't start addressing support tickets until the end of the 9-month period. Segmenting onboarding into three learning paths and determining productive tasks new hires could undertake at the end of each path, such as working on support tickets for topics and features they learned reduced the time-to-value and improved both efficiency and productivity.

Overall, the revamped onboarding program successfully addressed the identified challenges, providing a structured and comprehensive approach to integrating new hires into the organization and maximizing their contributions from the outset.

Design and Delivery

Recognizing the critical importance of efficient onboarding in driving business success, GTreasury has reimagined its approach to streamline processes, reduce onboarding times, and ensure new hires are equipped with the necessary knowledge and skills to contribute effectively, almost from day one.

Efficient HR Orientation with Hybrid Learning

The HR orientation, previously a manual and time-consuming process conducted either face-to-face or via virtual meetings, is now optimized for effectiveness and timesaving.

By leveraging LearnUpon's platform, GTreasury condensed the orientation training from 1-2 weeks to just 2 days, and in some cases, less than a day. Most of the learning curriculum is available on-demand in the LearnUpon portal and this is complemented by a 1-hour Q&A session that's more region-specific.



This accelerated timeline allows new employees to swiftly transition into their role-based onboarding, improving time-to-value and reducing strain on HR and IT teams.

Interactive, Role-Based Content, Created Together with SMEs

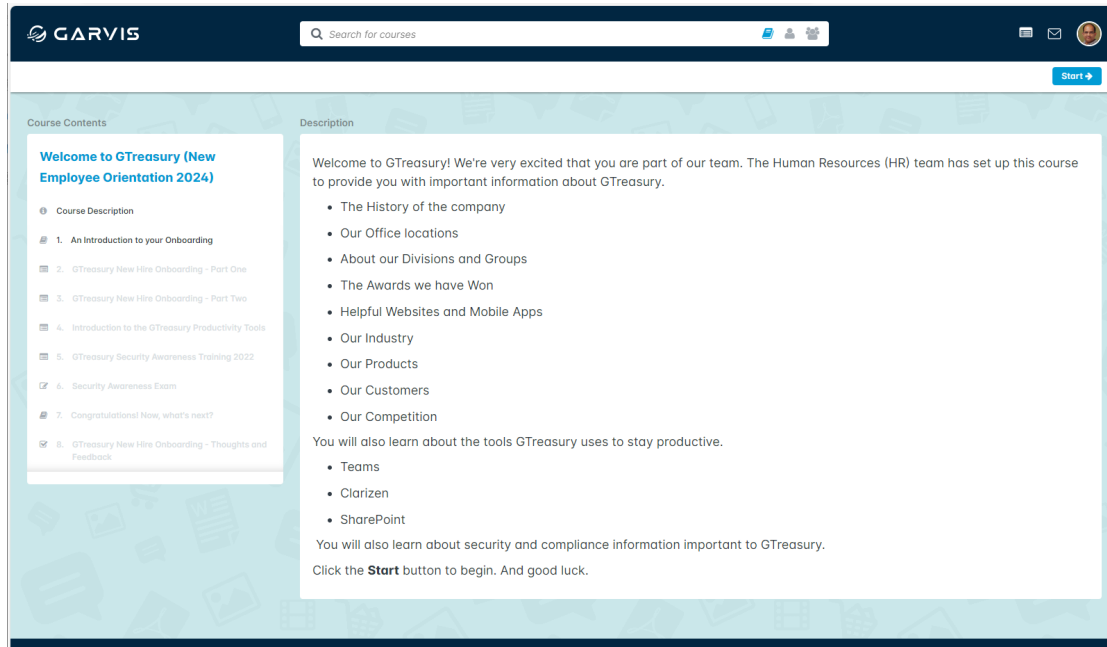


Image: Details of GTreasury HR Orientation Onboarding course content in LearnUpon portal (“GARVIS”)

Engaging experts from each department was crucial in building content tailored to the specific needs of Global Support Analysts. Although this initially required time away from their primary duties, the investment in content creation proved to be beneficial in the long run.

The curriculum incorporates regular touchpoints with team leaders and managers to ensure alignment and reinforce learning objectives. Embracing an agile methodology, the program emphasizes deliverables at the end of each sprint, fostering accountability and progress tracking - and fast-tracking new hires to be productive members of the Client Support team.

Content creation focuses on engaging and interactive materials, utilizing tools like Articulate Rise for course development. Video and audio elements are integrated to enhance learner engagement and retention. Additionally, courses on various systems and security protocols are sourced from platforms like BizLibrary, enriching the learning experience.

All content is curated and added to the LearnUpon platform, where it is organized into relevant curricula for delivery.



Automated Integration for Seamless User Management and Enrollment

GTreasury leverage LearnUpon's out-of-the-box integration with BambooHR which offers significant automation benefits, particularly in user management and enrollment processes.

By seamlessly syncing user data from BambooHR to LearnUpon, new hires are automatically created and invited to LearnUpon. Furthermore, the automated integration ensures swift enrollment of new hires into LearnUpon based on their department and hire date. This means that as soon as a new employee joins GTreasury, they gain immediate access to relevant training materials. This seamless access to learning resources removes barriers for new hires, enabling them to start their onboarding journey promptly and begin acquiring the necessary knowledge and skills for their roles.

Moreover, the integration enables GTreasury to tailor training experiences at scale by leveraging learners' data from BambooHR. With this information, GTreasury can create automated workflows that enroll employees in courses and groups tailored to their roles and career development paths. This personalized approach to training ensures that employees receive targeted learning experiences that align with their individual needs and objectives, enhancing engagement and effectiveness in the onboarding process.

Overall, the redesigned onboarding program at GTreasury exemplifies a strategic approach to talent development, leveraging technology and stakeholder collaboration to deliver a seamless and impactful onboarding experience for new employees.

Engagement

Transitioning to a culture of self-learning posed a significant challenge for GTreasury, given the prior absence of formal training processes. The organization needed to instill a mindset shift where employees proactively sought out training opportunities, especially for those more accustomed to traditional learning methods.

To support engagement, GTreasury implemented several strategies:

- **Executive Sponsorship:** Involving the CEO and executive team in promoting the onboarding program emphasized its importance and encouraged participation.
- **All Hands Meetings:** Regular company-wide and individual department meetings provided opportunities to reinforce the importance of ongoing learning and development.



- **Branding and Recognition:** Creating a recognizable learning brand, known as "GARVIS," helped to establish a sense of identity and ownership among employees. Additionally, branding the platform itself as GARVIS enhanced its visibility and encouraged employees to view it as a central hub for learning and development.



Image: Example of branded promotional material promoting GARVIS

- **Company-Wide Communications:** Incorporating information about GARVIS and available training resources into the company newsletter and communications ensured that employees were regularly reminded of the platform's value and the importance of ongoing learning.
- **HR Compliance Courses:** Bringing all, annual or other HR compliance courses onto the LearnUpon platform required employees to engage with the system, promoting self-enrollment and exploration of available training resources.
- **Manager Buy-In:** Securing buy-in from managers was crucial in encouraging their direct reports to engage with the onboarding program. Managers played a pivotal role in fostering a supportive learning environment within their teams.
- **Expert Involvement:** Engaging experts from each department to assist in content creation not only enriched the quality of training materials but also fostered a sense of ownership and investment in the onboarding process.



Image: Example of company newsletter featuring content in GARVIS

Overall, GTreasury recognized the importance of garnering support at all levels of the organization to drive engagement with the onboarding program. By leveraging various communication channels, securing executive and managerial buy-in, and involving subject matter experts, GTreasury successfully navigated the challenges associated with transitioning to a self-learning culture and fostered active engagement in its onboarding initiatives.

Measurable Benefits

GTreasury employs a multifaceted approach to measure the impact and ROI of its onboarding program, focusing on both quantitative metrics and qualitative feedback. Key metrics include the time taken for learners to complete each learning path, subjective feedback from leaders and peers on new hires' productivity, and the types of tickets new hires can handle after completing each learning path.

GTreasury prioritizes and identifies important metrics by aligning them with organizational goals and objectives. Metrics that directly impact business outcomes, such as time-to-productivity and ticket handling proficiency, are given precedence.



Additionally, feedback from leaders and peers provides qualitative insights into the program's effectiveness and helps prioritize areas for improvement.

Reduced Time-to-Productivity

Through streamlined onboarding processes and targeted learning paths, GTreasury has significantly reduced the time it takes for new hires to become productive members of the team.

By tracking the time, it takes for learners to complete each learning path, GTreasury gains insights into the efficiency and effectiveness of the onboarding process. A reduction in time-to-completion indicates improved onboarding efficiency and accelerated time-to-productivity for new hires.

The primary goal of the revamped program was to reduce the onboarding time from 6-9 months to 3-6 months. They have since reduced it to 3 weeks. This reduction in onboarding duration resulted in a substantial decrease in the cost of bringing a new hire up to speed within the company.

Before the reduction in onboarding time, the cost of onboarding one Global Support Analyst amounted to \$48,000. This calculation was based on an hourly rate of \$40 and an onboarding duration of 7.5 months, equivalent to 30 weeks. After the reduction in onboarding time to just 3 weeks, the cost of onboarding one person decreased significantly to \$4,800, maintaining the same hourly rate.

That means, across 21 Global Support Analyst new hires since launch, the company has already saved **over \$900,000**.

Faster Onboarding for GTreasury Global Support Analysts	Before	After
Hourly Rate	\$40	\$40
Onboarding Number of Weeks	30 weeks	3 weeks ↓
Cost of Onboarding	\$48,000	\$4,800 ↓
Projected Cost for 21 New Hires	\$1,008,000	\$100,800 ↓
Total Cost Savings		\$907,200

Image: Calculation with comparison of onboarding costs before and after implementation

Improved Ticket Handling Proficiency

Tracking the types of tickets new hires can handle after completing each learning path serves as a tangible measure of their progress and proficiency.



An increase in the complexity and volume of tickets handled indicates the effectiveness of the onboarding program in preparing new hires for real-world challenges, in turn simplifying ticket resolution and improving customer satisfaction and time-to-value across the board, reducing the team's average time to close a ticket down by **more than 50%**.

Subjective feedback from leaders and peers also provides valuable insights into new hires' productivity levels post-onboarding. This feedback helps identify areas of improvement in the onboarding program and highlights successful outcomes, such as increased confidence and competence among new hires.

"I just got off the phone with my team lead in APAC, who is part of the support onboarding focus group. I asked him what he thought about what we had done thus far. He said this is the best thing to hit GTreasury. If I had it when I first started, it wouldn't have taken me six months to get up to speed." - Bobbi Ward, VP of Global Client Support at GTreasury

By continuously monitoring and evaluating these metrics, GTreasury ensures that its onboarding program remains adaptive and responsive to evolving organizational needs, ultimately driving long-term success and ROI.

Overall

Several valuable lessons were learned through GTreasury's experience in building out the new hire onboarding program for this cohort:

- **"You can build it but they don't always come"**: Despite the availability of an excellent program and platform, the realization emerged that proactive communication and ongoing engagement are essential to drive adoption.
- **SME-led content creation is challenging but rewarding**: Building content proved to be a significant endeavor, with challenges in finding subject matter experts (SMEs) and allocating time for content creation and review. However, the investment in content development yielded tangible benefits, demonstrating time savings and increased efficiency once implemented.
- **Potential for re-use of content externally**: GTreasury recognized the opportunity to expand the use of content beyond employees to include clients and channel partners, thus broadening the program's impact and reach.

Looking ahead, GTreasury aims to capitalize on lessons learned by applying the same principles of this onboarding program to other teams, having recently started working with the Solutions Delivery team to ensure consistency in new customer implementations.



In addition, the team plans to leverage the latest features of the LearnUpon platform, such as pathways that branch by department and built-in live learning functionality to further centralize learning and drive personalization in onboarding experiences across various teams and departments.

As GTreasury continues to evolve its onboarding program, the focus remains on adaptability, responsiveness to feedback, and expanding the program's applicability to diverse audiences, driving continued growth and success in the future.



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