# Pdg

## Client Story #1

Onboarding Solution for Financial Advisors

Large Financial Services Firm

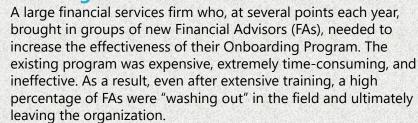


After 1 year, the number of Financial Advisors demonstrating client-facing proficiency increased by 50%

## **Impact**

- Higher Sales
- Increased Customer Retention
- Reduced Time to Proficiency

### Challenge



#### Solution



PDG partnered was engaged to complete an analysis of the organization's current practices. As result of the findings, PDG worked with the organization to transform the Onboarding experience from an information transfer classroom experience to a blended, experiential learning experience. Blended instruction was now delivered through e-learning, webinars, conference calls, and local branch sessions. The Onboarding curriculum shifted from "listening" to "doing" providing FAs practical application and insight into the requirements of their day-to-day job. FAs were provided with meaning support and reinforcement through an assigned coach. Coaches took responsibility for local training and mentoring and conducted a weekly 1-hour workshop using an easy-to-follow playbook created at the national level.