



**CASE STUDY:**

# Sales Onboarding (“Immersion”) Training

**Client Business Challenge:**

SunTrust Banks is one of the nation’s largest and strongest financial services companies. It offers a full suite of products and services designed to meet the needs of its consumer, business, corporate and institutional clients. The company’s Treasury & Payment Solutions Department had a gap in its onboarding of salespeople. Its leadership team hired Learning Curve Consultants to tackle the project and build all training materials for the 1.5-day session.

**Learning Curve Consultants® Actions Taken:**



**Identify**

Learning Curve Consultants recommended first interviewing subject matter experts to determine the largest gaps of new hires as it relates to their knowledge, skills and abilities. In addition, it captured the core responsibilities of the department’s three major sales roles. From this information, Learning Curve Consultants built a learning matrix and content outline before settling on course materials (participant manual, PowerPoints and appendix with job aids).



**Implement**

SunTrust chose to conduct a pilot of the course. Feedback from the first pilot group was extremely positive. It was agreed that the course design, flow and content was on point. Learning Curve Consultants and SunTrust both attribute project success to the familiarity the two have with one another and LCC’s ability to “hit the ground running.”



**Measure**

Learning Curve Consultants and the Treasury leadership team will track the success of its onboarding sales training by continuing to monitor assimilation of new hires. The program owners plan to do both formal and informal follow-ups with new hires and their managers.

**Client Testimonial:**

“We know Wayne will deliver results and exceed expectations. He understands our business and can jump right in and execute on even the most complex of projects.”

- Jennifer Brown, Organization Effectiveness Consultant, SunTrust Banks

