

Michelle Ockers:

Welcome to Elevate 25, Ravina. It's great to see you today.

Ravina Bhatia:

It's great to see you again. And we're going to talk about one of our favorite topics.

Michelle Ockers:

Skills development, of course, but first, breaking news, we've just heard yesterday, it's late November at the time we're recording this, that our skills development approach has been recognised in a National Industry Award here in Australia, the LearnX Awards. And we've been given a diamond level award for career development based on the work we've done using skills development or the skills builder, as we're now calling the approach, to implement an offer around a framework of learning linked to future work options that drive and support talent development. So Ravina, we're popping the bubbly now in a virtual sense, aren't we? And really happy to be here with our listeners to share an example of one of the organizations that we've done this body of work with that was included in the award nomination. Is there anything you'd like to add around the award?

Ravina Bhatia:

I think only that we both are so passionate about this body of work that we do. We've been working on enhancing it, improving it. over so much time now, it feels so good to see it get industry recognition.

Michelle Ockers:

It does indeed. So let's bring the listeners into the example we're going to talk about, the case study example. And the way this is going to work, listeners, is Ravina led this particular piece of work. So she's going to tell the story with us and I'll just keep it moving along. So Ravina, would you like to introduce us to the organization and the context?

Ravina Bhatia:

Absolutely. Now, for the listeners, you know that we've obviously done this for a number of organizations. And the one that we're showcasing today that we're talking about today is for a prestigious Australian retail bank. that is part of a larger financial conglomerate and this is specifically for the sales team of the bank. Now this bank operates with approximately 3,750 employees and it operates across Australia and New Zealand. Now, the background or the context that this bank came to us with was that it had recently transitioned its sales team from a client-based approach to a product-based growth approach. And it had also integrated a new sales team from within the conglomerate, from a completely different business. Now, this shift obviously brought with it a lot of change, a lot of new ways of working, and it necessitated a realignment of skills and approaches to match the bank's growth objectives.

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Michelle Ockers:

And of course, bringing teams together like this in itself can create a lot of challenges, Ravina, on top of that shift from client-based to product-based. So what was some of the impacts of this, some of the problems that needed to be addressed?

Ravina Bhatia:

You rightly identified it obviously brought with it its own challenges as exciting as change is. And this was specifically to do with firstly integrating the new sales team into the bank, a new sales approach, which not only impacted the new team, but also existing sales team members. And this led to a lot of confusion, there was a clash of organizational cultures and just a general feeling of unrest within the bank and specifically the sales team. This also led to attrition from the sales team and this had everybody concerned. Now the sales team, which evolved into their roles more by chance than design, had come from different backgrounds. Some of them had a financial services background, some of them didn't. So this change, where you would become product-based, lacked the specific development opportunities to adapt effectively to this new strategy. And it did result in employee dissatisfaction, and there was a growing trend of staff leaving the bank.

Michelle Ockers:

So, no doubt the skills piece, which we're going to focus in on, was one part of the bigger approach that the organisation had to take to addressing these challenges. We, of course, are going to focus in on the skills piece. But if it's appropriate, you might want to weave into the story some of the other elements, particularly around culture and how some of those overlays and the context you're working in can impact the approach you take around skills. So let's move on to what was the solution and how was this work done?

Ravina Bhatia:

Fantastic. So you rightly identified, Michelle, that this wasn't just a skills issue. In fact, when the bank and the team approached us, it wasn't saying, hey, we need reskilling, upskilling, we need a skills framework. The problem was shared. So we knew how we had to do a deep dive to find out what the root causes were and what is all the work that has to happen and not just in one space. We know that that's not going to work. So we took a comprehensive approach and we started from the ground up. We started engaging in detailed discussions, especially empathy interviews, human-centered design conversations, and we spoke with employees across various levels, across various tenures and backgrounds to understand their perspectives and their needs. And we compared their inputs with industry benchmarks and global best practices. And keeping all of the change in mind and what we'd heard, we knew that we had to take a skills-based approach from a development standpoint. We knew that there was upskilling needed. We knew that there was considerable investment in employees needed from what we heard. There were a few other environmental factors from the point of view of culture, from the point of view of other systemic issues that needed to be dealt with. Those were also highlighted as part of these empathy conversations. And we created an action plan outside of the skills project for those. So we knew all of this had to work hand in hand in order for this to be a success. Now, using the inputs across these conversations

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that we had, we co-designed a robust sales skills framework. And using this approach where we used a co-design approach, and we also looked at best-in-class skills frameworks of sales teams, generally within Australia. We looked at best-in-class sales frameworks of sales teams in financial organizations across Australia and globally. And this helped us bring together everything that we were hearing, the inputs, et cetera, ensuring that we're not missing anything important, but also making sure that we are contextualizing this to this organization's environment, employees, skills, and products. And then we tested this extensively within the bank to ensure its relevance and completeness. Now, Michelle, I'm sure our listeners are familiar with this process that I've talked about. We've used it, however, twofold here. Now, if you're not familiar with this process, we do recommend you go back and listen to the Elevate podcast episode on process.

Michelle Ockers:

Yes. The last one we did. Elevate 24.

Ravina Bhatia:

Yes, absolutely. And then come back and listen to this because that will add to it a certain amount of richness and you'll be able to relate all the actions that we took. What I do want to talk about is that in this empathy interview conversation, it was twofold. Not only did we talk about, really collect input around skills, but we did a deep dive into understanding what are all the concerns that are at play. So we can highlight those that will be resolved with the help of a skills framework and a skills development approach and those that will need to be systematically addressed outside of this body of work, but there should be a detailed action plan around it.

Michelle Ockers:

So, Ravina, we've covered off stage one in the process, which is co-designing your skills framework. You've talked briefly about that second phase, which is testing the skills framework. Did you want to talk a little about how that testing was done?

Ravina Bhatia:

Fantastic, absolutely. I love these questions that you ask. Yes, so we tested this framework in two ways. We firstly tested it with people that we'd spoken with to get inputs from, but we also tested it with employees we'd never spoken with so far. It gave us that fresh perspective. Now, this was obviously bringing in employees across the board, across different levels, ensuring we've got the right mix of people that we're testing with. In terms of the actual approaches that we used to test it, we had some guided testing that we did where we gave the skills framework, we walked people through how to use it, etc. Then we did some unguided testing as well, which is when you provide the sales framework with a little bit of guidance through e-mail, through written communication, etc, and let people play with it on their own. We wanted to see what is the feedback that we get back. We use that feedback across these formats, across these methods, across these audiences to iterate it. and ensure that it was relevant, it was complete, and it really was something that people could relate with. One of the things that we find across organizations that we work with, Michelle, and you'd probably be able to attest to it as well, is relatability of the solution that we come up with. If people don't feel that they can relate to what we're

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putting in front of them, the likelihood of them using it is very low. and it leads to a lot of adoption challenges, obviously.

Michelle Ockers:

It has to be relevant and feel useful, right, to your point. So when it was time then to go about implementation and creating accessible ways of engaging with the skills framework and developing skills off the back of that engagement, were there any specific risks or concerns or considerations that you factored in?

Ravina Bhatia:

Yes, absolutely. Now, because we took what we call an approach where we're addressing or we're doing this for sales teams across different products, we knew that there are different audiences involved. Now, testing the framework with these different audiences was the first step to address some of those risks that could come around with the issue of having different products or different parts of the business that they were in, even though they were all sales teams. In addition to that, we knew that we needed clear development parts, and we didn't want the framework to seem like a generic framework that we put together and one size fits all. There was a very interesting quote that I read recently, and I think I might have shared that in the last episode as well, but I'll reiterate it nonetheless, which is, one size fits none. And that's exactly, we had that in mind. So what we did was we created development activities and experiences that aligned with the new skills framework, keeping in mind the contextuality of employees across these different products, across different parts of the business. There was choice in how they could apply these development experiences. We've talked about multifaceted development experiences in formats that we use. But we also talk about having development activities that center around learning from experience, that center around learning from each other. And these activities were created in a way that you could use them irrespective of the part of the business that you were in while still feeling it was relevant for you. Now, let's say if there were certain activities that you felt that weren't relevant for you at all, either that came out of testing or employees would use other development experiences that we put together for them. So we tried to ensure that there was enough choice, that there were not just different modalities, but a different amount of richness and experiences woven into the development that we put together, associated with the skills framework. Because, I mean, again, I'll reiterate here, a skills framework is no good if employees don't know what to do with it. If you're not helping them to develop their skills, there's nothing that they can really do to interact with the skills framework that we put in front of them. So these experiences were curated to cater to individual learning needs and helped employees to develop at their own pace and preference and in the areas that were most relevant to them. I'll add one more really important element of the development, really, was all of this was put together and made tangible for employees in the form of an interactive SharePoint portal. This was themed and created to look interactive, to align with the growth objectives of the sales teams, as well as to align with the visuals that the sales teams already were interacting with every day. It didn't just look like any other SharePoint portal, we themed it, we created visuals that were themed according to the objectives of these teams, and most importantly, they were accessible across devices. This was really important for the adoption of this initiative because sales teams, as one might know, are usually on the road or they're traveling. And so therefore, having something that

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doesn't necessarily require them to sit in front of a system at all times and keep accessing it, it was really important for the success of this initiative. So yes, this portal was accessible across devices and could be used by employees at any point of time.

Michelle Ockers:

So apart from the actual content, and by content I don't just mean what we think of in terms of documents or e-learning modules, but the activities and the kind of social learning approaches that were built into the different development paths. A lot of thought has gone into the user experience with accessing, with engaging, with making it easy and attractive and a place where people find it easy to find things, where they want to engage with it and presenting it in a way that is just really appealing and I know that's one of the passions you have, can I put it that way, Ravina, a passion? around user experience and visual design. It's something you're very particular with and very careful and thoughtful about in the work that you lead.

Ravina Bhatia:

Oh, yes, absolutely. And this also, Michelle, talks to our key elements of skills development, where we talk about accessibility, where we talk about multifaceted development and having feedback cycles. And we had built all of this into the portal as well, all available for employees to be able to access.

Michelle Ockers:

So let's talk a little bit about feedback cycles and the sort of feedback and indicators of how well received and utilized this particular skills framework and skills assessment and the development pathways. All of this was when it was packaged up and released for use.

Ravina Bhatia:

Absolutely. So the approach, well, to summarize, it was well-received. There was a lot of positive sentiment around it. And the positive sentiment was around specifically the ease of use, the self-explanatory nature, the visibility it provided into people's development, and potential career progression, which from our conversations, we found to be one of the major reasons why people wanted to move on, wanted to leave. And some of the feedback around employees and leaders included appreciation of the clear role expectations and milestones. There was a lot of positive reception to the skills assessments that were included as part of the portal. These skill assessments were a combination of self-assessments but also skill-based online assessments that people could use to evaluate their progress and managers could use to have really healthy, robust development conversations with employees. And of course, the development in learning resources as well. There was a lot of recognition of the value in having these structured development conversations that were centered around the framework. And a phrase that I keep hearing a lot from employees across different organizations is, we don't know what we don't know. So tell us what we need to know, and also how we'll go about getting those skills. So really, this portal embodied all of that in the way that we'd put it together. Now, the leadership across the bank endorsed these initiatives contributing to a positive cultural shift. So they saw a tangible cultural shift, which was measured by a shift in the actual employee engagement scores of the bank, and the fact that

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people were more aligned with the bank's objectives and strategies. In addition, the project was very cost effective. This was not an expensive proposition. We leveraged an existing platform and we created it, adopted it using an agile approach. So each of the phases that we've talked about with you, we actually implemented those one by one, tested and learned from it before we went on to the next phase. So the initial investment in creating the skills framework in Portal was in fact offset by subsequent inefficiencies and the use of templated pages in the Portal and also upskilling of learning partners within the team to be able to continue to do this across the bank.

Michelle Ockers:

So I love the scalability of this, right? When you talk about efficiencies, there's kind of several things I love about the way this is set up in terms of the final offering that people can engage with in a more self-directed way. It doesn't require L&D to constantly be there to facilitate. You're setting up the environment, you're setting up the paths, you're setting up resources, activities, and really helping to build a culture of continuous learning because you've got leaders and individuals better equipped to self-direct in ways that you know are going to add value to their immediate performance as well as their career development. It's an approach that, you know, wherever we go when we talk to people about the approach, they see the sense in it. And in terms of efficiency, just a great way to scale more self-directed learning in a meaningful way without L&D just constantly having to turn up to facilitate things.

Ravina Bhatia:

Absolutely. It did. And the utilization data that we gathered, Michelle, also told us that not only were people using it once or twice, but people kept coming back to it. We monitored utilization for 6-12 months to check sustained use so that this is not just a new shiny toy that we are going to bring in. Is it actually being used? What pages are actually being used? The beauty of using SharePoint is that it comes in built with those statistics. There's nothing extra that you're doing. All you need to do is pull reports from the existing software applications that your bank already has and interpret those. And we found that at its lowest, the utilization was 60%, which is pretty high still compared to any other initiative that I've implemented across organizations. And at its highest, it was around 352% usage. So we saw the data and we knew exactly where we had to make those improvements. All of the pages had feedback cycles built into it, we talk about feedback loops, so there were two feedback loops built into it. One in the form of the skill assessments that people could take. Skill assessments gave us data that could be used to tell us where is it that the learning and development team needs to focus its energies on, which skills do they need to focus on that are constantly coming back as focus skills for the sales team, instead of worrying about all of the skills that were part of the framework. So it obviously leads to future savings in time and investment and prioritization as well. But the second kind of feedback cycle we had built in was in the format of instant feedback on these portal pages itself, where employees had the ability to tell us which resource was not relevant, where employees had the ability to tell us where they thought a resource might be useful, and could be added. And this isn't to say that every single piece of development or resource that a person wanted to get added would be added. It would go through its cycle or where we would consult with SMEs and make sure that it was given its due diligence before making its way into the portal, so that it's not just a list of courses and resources that people need to go

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through, and it really has that richness in development that we would want a portal like this to have. So all of this was really appreciated by the organization but also leading to tangible shifts. The initial issue that the business came to us with was to do with attrition and there was successful shift in employee retention numbers across the bank, specifically in the sales team. We also saw an increase in internal mobility, where there were a lot more roles filled internally than had been in the last five years of the bank. So these were some important success measures that we continued to track for the bank and ensured that we were really meeting these business objectives and performance objectives. And interestingly, the successful implementation of this framework actually sparked demand for similar frameworks across different business units within the bank. So that was great to see because people could see the value in having these skills frameworks. And for this not to merely be an academic exercise implemented, by a learning and development team, but in fact make shifts in real numbers for the bank. I will share with you feedback that we received verbatim from one of the employees as part of our you know, when we were doing the focus groups to round up and testing. And they said that “if only I had this, when I started working in the organization, I would have been able to clearly understand my role a lot more. And it would have definitely helped me in my conversations with my leaders”.

Michelle Ockers:

Excellent. That's the kind of feedback we love to hear. And I think that little case study is a great spot to end our series, our skills development series for the moment, along with the announcement of the LearnX Diamond Award, Ravina. We're going out on a high. This is our last Learning Uncut episode, either Elevate or the regular case study episodes for the year. So if you would like more on skills development, we are getting ready to share more if you've enjoyed listening to the series or even if you're just brand new to the series, we're going to be running some webinars around skills development, where we'll go more deeply into some of the things we've discussed, and of course, use a different kind of format to reiterate the important points for you if you are looking to build skills in your organization. That will be kicking off in February. So please go to the website, learninguncut.global, and look on the events page for opportunities to register for those webinars or just check the show notes. Ravina, it is coming up to the Christmas break here in Australia. Of course, that's a longer break, but people in many cultures around the world will be taking a break at this time. So I'll get you to join me in wishing them a safe and happy festive season and a restful period.

Ravina Bhatia:

Absolutely. A very happy holidays to everyone, all of our listeners. We're excited to go on a break too, Michelle, aren't we?

Michelle Ockers:

It's been a big year, Ravina, and it's just amazing. It always speeds up towards the end of the year. But it's been wonderful to relaunch Learning Uncut as a joint business, to have the Elevate series up and running, and of course to be doing a lot more in the skills space alongside our strategy building and some of our other service offerings. We're excited to come back all recharged ourselves and do more

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great work to help organizations lift their impact through their L&D teams next year. Have a great break, Ravina.

Ravina Bhatia:

And you too.



Learning Uncut are learning and development consultants that help Learning and Development leaders and their teams become a strategic enabler so that their businesses can thrive. We work in evidence-informed ways to drive tangible outcomes and business impact and are strong believers in the power of collaboration and community. We specialise in helping to build or refresh organisational learning strategy, update their L&D Operating Model, enable skills development, and conduct learning evaluation. We also offer workshops to shift learning mindset and practices for both L&D teams and the broader workforce – as well as speaking at public and internal events.

Learn more about us [at our website](#).

About your host, Michelle Ockers



Michelle is the co-founder and Chief Learning Strategy at Learning Uncut. She is an experienced, pragmatic organisational learning strategist, L&D capability builder and modern workplace learning practitioner. She also delivers keynotes, workshops and webinars for learning and broader professional or workforce groups at both public and in-house events.

Michelle received the following prestigious industry awards in 2019:

- Australian Institute of Training and Development Dr Alastair Rylatt Award for L&D Professional of the Year – for outstanding contribution to the practice of learning and development
- Internet Time Alliance Jay Cross Memorial Award – for outstanding contribution to the field of informal learning



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