



One of the marquee **Mutual Fund** in India needed a learner-friendly LMS that can automate training and coach their staff on handling all types of mutual fund customers.

# Overview

The Mutual Fund in India manages investment-related products. Paradiso Solutions had gone on contract with their customer service division.

## Client's Requirement

- ◆ Mutual Fund company wants to train and coach their employees on how to deal with customers and handle queries related to investments, compliance, and standard queries related to Mutual Fund customers.
- ◆ A single platform where they could host all the pieces of training and training the employees.
- ◆ Mutual Fund products are sold by the parent company staff, so, those people also get the training from the same platform.

## Challenges Faced

- ◆ Mutual Funds team provides one training at a time to users with a provision to define the training's last date.
- ◆ The training team wants to have control over accessing the platform and training.
- ◆ The second most aspect of their training was to extract reports for compliance.

## Solutions

- ◆ Paradiso is the Learning Management Solution with the features of self-paced training.
- ◆ Training includes SCORM Learning to educate the users about the topic, followed by the Assessment.
- ◆ Paradiso offers Mutual Funds team with one training at a time to users with a provision to define training last date.

## Results

- ◆ Paradiso LMS built a mechanism to allocate training to users in batches.
- ◆ The training team started enrolling a new batch of users every week or a month with one training option at a time or multiple pieces of training.
- ◆ The Mutual Fund team is now able to skip the older user records and extract active user's records in the system.
- ◆ Robust Report Builder allows you to extract the report with several levels of filtration for data.

