



A Bank COO's Checklist for **Modern Learning** & **Knowledge Solutions**



Is your learning and knowledge platform a strategic hindrance or a powerful catalyst for growth?

Use this checklist to evaluate whether your current system is advancing your institution's goals or if it's time to adopt a solution built for modern banking operations.

SECTION 1

Driving Operational Efficiency

Your platform should actively reduce costs and improve productivity by:

- Empowering your frontline with instant, verified answers.
- Drastically cutting the time and cost to create and deploy new training.
- Boosting staff proficiency on core banking technology and applications.
- Reducing operational support costs by educating customers for self-service.
- Accelerating new hire time-to-productivity.

SECTION 2

Building a High-Performing, Future-Ready Team

The right solution helps attract, develop, and retain top talent. Does yours have:

- Tools that build employee confidence for effective cross-selling/upselling?
- Rapid upskilling for new technology and product launches?
- Career development and continuous learning paths that drive retention?
- The ability to create and deploy new training content in days, not weeks?

SECTION 3:

Minimizing Risk & Simplifying Compliance

Simplify compliance with a library of expert-built, ready-to-deploy training. Are you currently able to:

- Instantly access a library of compliance, fraud & cybersecurity content?
- Use one platform to deliver security training to staff and customers?
- Embed critical risk and compliance training directly into daily workflows?
- Create robust, automated audit trails for stress-free reporting and audits?
- Instantly push notifications for critical policy and procedure updates?

High-performing teams reduce risk upstream—before it becomes audit work.





SECTION 4

Elevating the Customer Experience

Teams are only as good as the training and tools they have.
Does your platform:

- Ensure consistent and accurate service delivery across all channels
- Improve First Contact Resolution (FCR) with instant knowledge access
- Offer customer-facing educational resources for self-service support
- Support faster complaint resolution, improving Net Promoter Scores (NPS)

High-Performance Learning Stack: Must-Haves

Look beyond the LMS. These capabilities turn training into a strategic advantage for modern banks:

- ✓ **Microlearning & Flow-of-Work Delivery** – Fast, focused lessons embedded into daily workflows so employees learn without logging off.
- ✓ **AI-Powered Knowledge Base** – A single, reliable source that delivers instant, contextual answers, for both staff and clients.
- ✓ **AI Content Authoring Tools** – Generate engaging courses, quizzes, and assessments at scale without waiting on instructional designers.
- ✓ **Automated Compliance Tracking** – Monitor, manage, and prove compliance with minimal effort. Auto-renew certifications and generate audit-ready reports instantly.
- ✓ **Game-Based Learning for Performance** – Use interactive learning games to develop real-world skills and drive motivation with competitions that reward key business goals.
- ✓ **Shared Content Marketplace** – Leverage up-to-date training content from a community of trusted institutions, reducing costs and duplication.

Ready to See What's Possible?

If your current system doesn't measure up, you're not stuck.
See what a modern learning stack built for banks looks like.

[Book a Demo](#)