

CASE STUDY



“ LMS iTutor provides an overview of standard training, as well as the special financial training of all our retailers. ”

Ján Matejovič, Education Department Director

Company profile

Generali Poist'ovňa, a. s. is part of the Generali Group, which is one of the world's leaders in insurance. The origins of the Generali Group date back to 1831, when the Assicurazioni Generali company was founded in Trieste, Italy. With more than 180 years' experience in insurance, it is now one of the leading companies in the global insurance and financial market.

Generali has been operating in Slovakia since 1996 and is one of the three strongest insurance companies on the Slovak market. It is a universal insurer, providing both life and non-life insurance products, to individuals and to businesses. It is part of Generali CEE Holdingu. The beginning of 2015 saw the successful integration of Genertel and Evropská cestovní pojišťovna under Generali, thus strengthening the insurance company's market position. In Slovakia, Generali has almost 650 employees and more than 600 salespeople in its own sales network, which has over 100 branches. It provides its services to more than 600 000 clients.

In 2020, Generali was rated by a professional panel as the Most Innovative Insurance Company of the Year in the Golden Coin 2020 competition.

Introduction

To enable Generali Poist'ovňa, a.s. to stay close to its customers and be available in any situation, it has an extensive network of branches throughout Slovakia, which makes it very complicated for the company to distribute its training content to all its retailers. Moreover, according to the Slovak legislation, each retailer has to undergo specialised OFV (Special Financial Training) courses in order to be entitled to offer and sell certain financial products. Keeping records of these courses is no trivial matter; there are defined OFV Sectors, which are further divided into individual Levels. Each Sector Level corresponds to a set of financial products that a retailer may sell once that Sector Level has been successfully completed and is valid. Information on the validity of OFV Sector Levels for the individual retailers must also be sent to Generali's internal system.

Generali therefore sought a training platform that would provide all the necessary functionality. From the standard platforms, such as the efficient scheduling of attendance training and building a clear and consistent e-learning platform, through to highly specific requirements in the form of truly effective records on the completion of OFV courses, including sending the validity of all retailers' individual Sector Levels to the internal Sirael system.

Customer requirements

Generali stipulated several basic requirements for the new LMS system, which will enable:

1 Any user structures to be defined

The first of the basic requirements for the new LMS system was to enable simple records of employees and retailers to be kept in a clear tree structure on the basis of various rules. This includes the classification of employees by their job position, retailers in the sales network, or any other rule. At the same time, the new system should allow training courses to be allocated very easily and quickly, including the option to include the allocated courses in comprehensive training plans.

2 Clearly record the validity of OFV courses, including connection to the internal system

The key requirement here was the ability to connect the new LMS to the internal system. In order for a retailer in General to be able to sell a particular financial product, he or she must have completed the prescribed product training for that product, and a record of that must be made.

The OFV (Special Financial Training) courses are a separate chapter in themselves, as according to the Slovak legislation they must be completed by every retailer that wants to sell selected financial products. Keeping records of the validity of these courses at the retailers is crucial, and therefore it should not be a problem for the selected LMS to record the validity of their individual OFV Levels.

iTutor LMS offered everything necessary

iTutor LMS from Kontis, s.r.o. is a modular system that can be configured according to the customer's needs. With any growing demands on the system functionality, the configuration can be easily extended at any time.

To meet Generali's requirements, the basic *iTutor LMS* configuration has been extended to include the *iTutor Catalog module*; the *iTutor Qualification module* has been added over time.

iTutor LMS offered a clear record of employees and enabled their basic training/adaptation plans to be set immediately

All users are recorded in a clear tree structure, where they can be added to any number of separate branches, corresponding to various criteria. This means that training coordinators can easily model users' organisational structures exactly as they need to. Employees are thus easily divided up into groups according to the relevant departments, with retailers placed into groups corresponding to the appropriate parts of the sales network.

LMS iTutor allows a training (adaptation) plan to be defined for each group of users, which clearly guides all the members of the given group through their basic study obligations. LMS iTutor also ensures that no one misses out on any important event. Via personalized automatic e-mails, it informs employees, retailers, managers and administrators about everything important that goes on or is planned on the training portal. This means that users are notified when the end of the time to study a course is approaching in the training plan.

Clear reports are prepared for managers and coordinators, enabling them to immediately check how individual employees or retailers are fulfilling the prescribed adaptation plan over time. Reports can be displayed either for a specific group of users or for all of them together, and as the reports can be exported to Excel spreadsheets, they can be further filtered in detail in MS Excel.

iTutor LMS provides a perfect overview of all retailers' OFV training

One key area of training at Generali is OFV (Special Financial Training). According to the Slovak legislation, these courses must be passed by every retailer who wants to sell financial products. OFV training is divided into Sectors (Capital Market, Insurance and Reinsurance, Provision of Loans), which are further divided into individual Levels (basic, secondary and higher).

LMS iTutor offers the option to define the structure of training content exactly as needed. Therefore, administrators had no problem defining courses representing the individual Sector Levels, including the links between the individual Levels. Retailers are always allocated the Level of the selected Sector required of them by Generali – this is assigned as compulsory. Higher Levels are automatically allocated as optional. In addition, each retailer who is to complete at least one of the OFV Sector Levels is assigned a professional mentor, who guides them through the study process. The mentor can be removed or changed at any time, although the complete records of the mentors of the individual retailers are archived. This is also the case if a mentor or retailer's account is deleted.

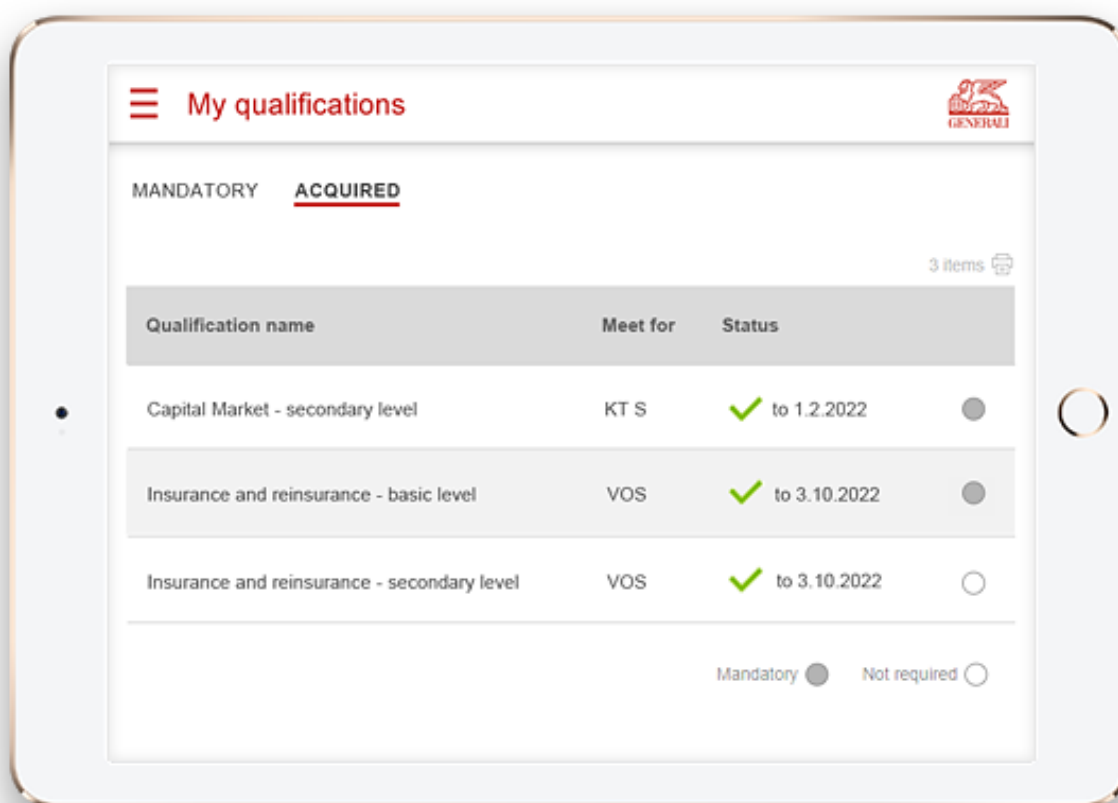
Retailers at Generali complete the OFV courses required to obtain the validity of a specific OFV Sector Level at externally accredited companies. They prove to Generali that they have passed these courses by presenting confirmation (a certificate), or the

responsible Generali employee checks the completion of the course and the validity period in the register of the NBS (National Bank of Slovakia).

Authorised system administrators then enter information on the completion of the OFV course by a particular retailer into *LMS iTutor*, which records information on when the retailer completed the course, how long it is valid for, who registered the record and when it was registered. For security reasons, each system administrator can define which retailers/groups of retailers they can assign to complete OFV courses.

LMS iTutor is also connected to the Sirael internal system – to enable retailers at Generali to sell a particular financial product, the record of the validity of the corresponding Level of the OFV Sector must be in the Sirael system.

In their user interface the retailers themselves can immediately see which OFV Sector Levels are compulsory for them. This obvious includes information on how long they are valid for, if they are registered as having successfully completed the relevant course. Each retailer is also automatically notified by the *iTutor* system when the validity of their Sector Level is coming to an end.



Thanks to the My Qualifications application, each retailer has an overview of which OFV they have completed

Final summary

By installing *iTutor LMS* from Kontis, s.r.o., Generali has obtained a robust training portal that:

- 1 is intuitive, convenient, fast and easily accessible to all employees and retailers,
- 2 enables all employees and retailers to be incorporated into a clear organisational structure according to various rules,
- 3 has enabled comprehensive training/adaptation plans to be created for individual groups of users,
- 4 provides a detailed and clear record of OFV courses completed by all retailers and sends records of the validity of those courses to the internal Sirael system
- 5 pleasantly guides all users through their training and uses personalized automatic e-mail notifications to inform them of everything they need to know