



HSBC Picks NetDimensions for Continuous Learning Solution for Asia Pacific

One of the world's largest banks, HSBC implemented NetDimensions' Enterprise Knowledge Platform (EKP) to promote continuous learning among its employees. Speed of installation and ease of use were key factors in the decision to select EKP.

When HSBC chose NetDimensions' Enterprise Knowledge Platform (EKP) as the cornerstone of an e-learning network that would serve the bank's employees throughout the Asia Pacific region, several factors shaped the decision.

Speed of implementation was important, as was multi-language support. John Kazan, HSBC's senior manager, information technology training, says, "We began evaluating e-learning systems in early 2000, and our initial criteria were straightforward—the system would have to be robust, scalable and based on modern technology. At a minimum, we needed to be certain the system could support future expansion, integrate with our other IT systems and be relatively simple to administer."

Kazan continues, "We followed the axiom, 'Start small and think big,' in implementing EKP. We launched the system with 14,000 users in Hong Kong in two phases in 2001. In 2002, we expanded it to serve 37,000 employees throughout the Asia Pacific region."

Ray Ruff, NetDimensions' chief technology officer, says the need for scalability and extendibility made EKP's underlying Java component-based architecture particularly attractive to HSBC.

"Essentially, this was an off-the-shelf installation, which made EKP highly cost effective and very easy to deploy rapidly throughout the bank," Ruff says.

On time and on budget

Several factors contributed to a rollout that was on time and on budget. First, EKP does not require special software to be installed on the user's computer. Learners can access the system through any standard Web

browser, such as Microsoft Internet Explorer or Netscape Navigator. This is valuable in saving resources that would otherwise have been needed to upgrade 37,000 users' PCs.

Second, in addition to giving users a familiar way to access the system, the EKP interface is intuitive and very easy to use. This simplified training requirements prior to rolling the system out to a large user community.

The third factor was the ease with which EKP could be administered, including interfacing with HSBC's existing IT infrastructure.



HSBC was able to use the Enterprise Knowledge Platform's XML data loader, a standard feature of EKP, to process data that the bank gathers from other internal systems. This helped speed up the rollout because it allowed HSBC to use existing interfaces rather than developing several new applications. In time, HSBC plans to create a direct, real-time interface to their HR system using EKP's application adapter technology.

Configuration versus customization

"We wanted a relatively fast rollout to large numbers of users, so we knew that we couldn't spend a lot of time introducing all sorts of highly customized features to the system," notes Kazan. "As a result, the ability to configure—rather than having to customize—EKP to meet our business processes was an important consideration in our decision to go with NetDimensions."

For example, HSBC used EKP's role-based permissions structure to create a hierarchy of local and global administrators. The permissions system allows administrators to define what individual users can see on their screens. It also enables HSBC to distribute the administrative workload among groups of local managers who can take care of their own areas. This approach gives groups within the bank the independence to address their own business requirements without affecting the entire system, a key element in generating buy-in.

"Having a configurable learning management system that anticipates customers' requirements is essential for rapid implementations," notes Ruff. "But the LMS must also be able to handle future events, like the launch of a new corporate identity, a merger or acquisition, or an internal reorganization. We designed EKP to be easy to configure and to re-configure, whether clients make the changes themselves, or use an outside consultant."

The world's local bank

HSBC describes itself as the world's local bank, a claim it backs up with a network of some 7,000 offices in 81 countries and a company-wide emphasis on hiring, developing and retaining local people.

This global/local philosophy is mirrored by the bank's approach to e-learning, which combines international best practices with local touches that make learners more comfortable and helps them retain what they have learned.



An important element in this process is delivering courses in the learner's preferred language. The HSBC implementation started with approximately 500 courses in English and traditional Chinese characters, and eventually the bank expects to offer courses in several additional languages. EKP's ability to support any language that can be represented using the Unicode standard makes it a particularly good fit for this type of application.



HSBC also found that it was helpful to give learners an element of control over the look and feel of the system's user interface. "HSBC staff can choose from 10 different 'skins,' all of which run concurrently and shape the appearance of the screen," says Ruff. "We've been pleasantly surprised at how popular this feature has been with users, who say it makes the system more interesting and enhances the appeal of online learning."

Like many global organizations, over the years HSBC has acquired e-learning content from a variety of sources. "We worked closely with HSBC to help them optimize their content," adds Ruff. "The bank purchased courses from several vendors, as well as developing its own courseware, and they needed to ensure that all the different pieces worked together in a coherent and consistent fashion. We were able to help them accomplish that from the system side, and the bank now has the information managed in the way they want."

"HSBC evaluated around 30 learning management systems," says Kazan. "But at the end of the day we selected EKP on the strength of NetDimensions' people. We looked at all the major solutions, but where NetDimensions took the lead was in its willingness to accommodate changes, and their determination to tailor a solution to our plans to implement e-learning throughout our organization."