



# Old Mutual South Africa connects and learns.

Financial services provider improves training with advanced eLearning platform and maintains its customer focus.



"Adobe Connect is a highly scalable enterprise e-learning platform."

*Dimitri Merritt, eLearning Specialist,  
Old Mutual South Africa*

## SOLUTION

Adobe Connect

IN PARTNERSHIP WITH



## RESULTS



### EFFICIENT TRAINING

Enabled 2,500 learners to be trained in less than three days



### ACHIEVEMENT

Increased pass rates from 54% to between 80% and 90%



### CUSTOMER FOCUSED

Increased broker availability for customers and reduced travel requirements



### ON DEMAND

Provided instant access to live and recorded webinar content

## Old Mutual South Africa

Established in 1845

Employees: More than 57,000

Johannesburg, South Africa

[www.oldmutual.co.za](http://www.oldmutual.co.za)

## Dax Data

[www.daxdata.co.za](http://www.daxdata.co.za)

## CHALLENGES

- Enabling efficient broker meetings and training sessions, and streamlined content development
- Reducing costs associated with travel and time away
- Increasing control over training content to provide brokers with up-to-date information
- Improving employee productivity and increasing consumer interactions

## The costs of doing business

The Personal Finance Advice (PFA) Division at Old Mutual South Africa is home to many agents who specialize in providing face-to-face financial advice. A major cost associated with delivering efficient customer services is adviser training. Adding to the training challenge, the PFA adviser force is distributed across the country, in all the major centers as far north as Limpopo.

Thanks to Adobe Connect, advisers now have immediate access to learning content and are no longer limited from accessing subject matter expertise, whatever their location. Advisers can attend and participate in eLearning sessions with no specialized hardware or software—the only requirement is an Internet connection.

“Adobe Connect is a highly scalable enterprise e-learning platform,” says Dimitri Merritt, eLearning Specialist at Old Mutual South Africa. “It’s a high-end solution and because of its scalability and the modular nature of its components, it’s possible to customize Connect to meet a client’s exact needs. Modules can be added when required.”

## Improving communications and productivity

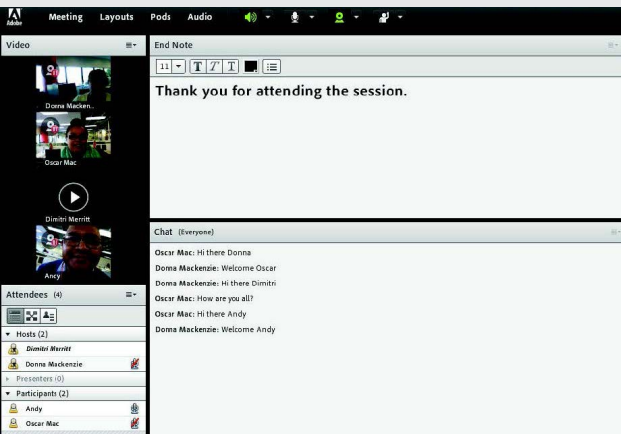
Adobe Connect helps streamline resource management within the PFA Division while improving productivity. It also enables managers and adviser to handle their continued learning more efficiently.

Aside from its conferencing capabilities, Adobe Connect offers learners a virtual classroom interface to participate and learn. Once logged on, users can receive streaming audio or video, as well as download documents. A polling capability also facilitates information gathering.

A particularly attractive feature of Adobe Connect is its application program interface (API) which makes it easy to add new capabilities directly into the solution. The PFA Division has harnessed the power of this technology—which only requires one code base and can run across multiple platforms—by rewriting its learner user interface (LUI) application to enable advisers to access information online.

Within the LUI application, users can access previously stored and saved resources and other documents on the Adobe Connect Server. This has generated a meaningful return on investment for PFA.

“For example, if there’s an update on the Financial Advisory and Intermediary Services (FAIS) Act, PFA would be able to host training sessions specifically on this topic, record the sessions, and then make them available to advisors through the LUI application,” says Merritt. “In other words, the Adobe Connect API allows users to interact with the features and content of Connect via a third-party application.”



## SOLUTION AT A GLANCE

- Adobe Connect

## A powerful eLearning solution

The educational host can collaborate with learners through several activities. For instance, he or she can load Microsoft PowerPoint presentations and narrate or host the forum live. It's also possible to call up a whiteboard to draw on to illustrate a point. Users can see the host's desktop live within the user interface and can access information for discussion. Meetings or lectures can be recorded and archived for future playback and can also be made public or viewable to select participants.

Adobe Connect provided advisers with an effective and powerful eLearning solution that helps ensure they stay up to date on critical business topics, while having the freedom to participate in meetings from anywhere.

Much of the power of Adobe Connect is in its capabilities as a highly scalable web conferencing application, a training system, and a modular system. These features combine to make Adobe Connect a powerful enterprise tool. Adobe Connect offers significant improvements compared to other applications in terms of control over event creation. For example, Adobe Connect supports fully customizable event microsites, customizable event landing pages, new registration options, SCORM compatibility, reporting, and much more.

## About Old Mutual South Africa

Old Mutual South Africa (OMSA) is the largest financial services provider in South Africa with services extending into Kenya, Malawi, Namibia, Zimbabwe, and Swaziland. Servicing millions of personal, commercial, corporate, and institutional clients—nationally and internationally—Old Mutual boasts strong operating performances across all divisions. Its success is demonstrated through its access to international capital markets and the diversity of its business which spans investment, life assurance, asset management, banking, healthcare, and general insurance.

For more information

[www.adobe.com/products/adobeconnect.html](http://www.adobe.com/products/adobeconnect.html)



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