



## Blended Learning at UBS



### The Company

*UBS is the world's largest wealth manager, a top tier investment banking and securities firm, and one of the largest global asset managers.*

*In Switzerland, UBS is the market leader in retail and commercial banking.*

*Headquartered in Zurich and Basel, UBS is present in all major financial centers worldwide.*

*UBS's financial businesses employ over 75,000 people worldwide.*

#### Project:

Operational Risk Application (ORA)

#### Authors: 3

#### Modules:

Demo, Training

#### Focus:

Implementation of a new Risk Management Software and Training of 10,000 Employees

## UBS Client Advisor Training

### The Challenge

To comply with the provisions of the Sarbanes-Oxley Act Section 404 the Swiss UBS banking conglomerate, one of the world's leading financial institutes, implemented the Operational Risk Application (ORA). The Sarbanes-Oxley Act requires the management of USA businesses listed on the stock market to publish information in their annual reports concerning the scope and adequacy of the internal control structure and procedures for financial reporting. The aim is to minimize the risk of reporting a false annual report.

For UBS, Risk Management is of prime importance. Internal procedures are controlled by Operational Risk Assessment in which the ORA checks risks over a multi-phased self-certification process.

Since the application would be used by approximately 10,000 UBS employees, the company required a quick and simple solution to support users in the new environment, whereas it had to be adapted to the users various positions and hierarchical levels.

### The Solution

datango has been actively supporting UBS in many different company-specific applications as well as a customized CRM platform that has been in use by more than 3,000 of the bank's client advisors since 2005.

UBS made the decision to go with datango's support with the ORA project. The reasons? A history of successful cooperation and the many advantages in comparison to other tools: datango not only allows the creation of screenshots, but the reproduction of websites with their HTML code intact that in a series can be applied to create tours. Not to mention the extremely low memory requirement and the simple creation of modes in one individual recording process. All these contributed to the high level of acceptance of the datango solution.



## Blended Learning at UBS

One of the project's main functions was datango knowledge suite's AICC capability, which enabled the integration of tours into the UBS learning platform.

Information pertaining to the use of lesson units, such as the duration of the exercise or the results from out of the test mode is communicated over the AICC interface in the form of Learning History directly to the system "step".

### The Result

In less than two months only three authors were able to create approximately 90 lesson units in the Demo and Practice modes including documentation.

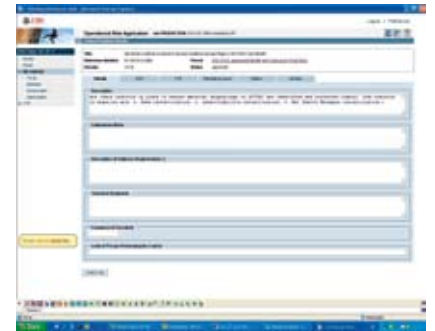
The 90 lesson units are being used by 10,000 employees in different areas. Each user may individually refer to respective role-specific lesson units and become familiar with the ORA through the Demo and Practice modes.

UBS was able to quickly reach their goals defined at project start since efficiency, above all due to the development of web-based training, was considerably heightened. In addition, the "look and feel" of the new software in combination with datango support achieved a high level of user acceptance.

### The Future

The UBS project team assessed the cooperation with datango as excellent and stressed in particular the successful development of new functions, quick support reaction times, and customer-friendliness.

In addition to the current datango support of the ORA release planned for the end of 2006, a rerecording function is to be implemented that will automatically update content.



### datango AG

*datango AG was founded in Berlin in 1999 and boasts subsidiaries also in a number of European countries and in the United States.*

*As one of the leading providers of Electronic Performance Support Systems (EPSS), it offers companies complete software solutions for the entire lifecycle of an application - from project design and initial implementation to user support.*

*The datango AG has developed a live navigation support, that provides optimal just-in-time learning for the end user.*

*datango AG's clients include Bosch, Bayer Schering Pharma, e.on and SPAR.*

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