

# Financial Services

Making Business Work



## Clients

Allmerica Financial Corporation  
American Express  
BankOne  
Bank of America, NA  
Chase Manhattan  
Citigroup  
CIGNA  
Comerica Bank  
Dow Jones & Company  
Dun & Bradstreet  
FDIC  
Federal Reserve System  
Fidelity Investments  
Fleet Financial  
Freddie Mac  
GMAC  
The Hartford  
HomeEq  
Janus Funds  
John Hancock Financial Services, Inc.  
KPMG Consulting, Inc.  
Mellon Financial Company  
National Securities Clearing Corporation  
Putnam Investments  
Prudential Financial  
The Travelers Insurance Company  
UNUMProvident Corporation  
Wells Fargo

## Challenges

Organizations in the Financial Services and Insurance industry are under tremendous pressure to provide accurate, up-to-date product information and quality service to their customers. With mergers and acquisitions, government regulations, and increasing competition from new sectors of the industry, it is critical that policies, procedures, and product information be accurate, clear and concise, and easy to access and use.

## Solutions

Information Mapping has worked with many of the world's leading financial services and insurance organizations to help them

- combine policies and procedures to support mergers and acquisitions
- make accurate, complete product information available to financial advisors
- communicate regulations for ensuring compliance with FDIC, OTS, OCC, SEC, and other regulations
- document new procedures that minimize errors and improve efficiency
- design e-content architectures that make Web information accessible and usable, and
- develop easy-to-use training materials that minimize user errors.



## Information Mapping Worldwide Offices:

Australia • Austria • Belgium • Canada • Denmark • Dutch Antilles • Finland • France • Germany  
Hong Kong • Indonesia • Ireland • Japan • Latin America • Luxemburg • Malaysia • Mexico  
The Netherlands • New Zealand • Norway • Philippines • Portugal • Puerto Rico • Singapore  
South Africa • Spain • Sweden • Switzerland • Taiwan • Thailand • United Kingdom • United States

## Services

Information Mapping offers a diverse set of services to help organizations improve the effectiveness of their information and knowledge.

## Consulting and Development

Our consultants can provide the following services:

- Knowledge Strategy Consulting
- Knowledge, Documentation, and Web Audits
- Best Practices Documentation
- Content and Architecture Development
- Expert Web and Intranet Content Review
- Web site Navigation and Prototype Development, and
- Training Design and Development.

## Seminars

Information Mapping uses seminars and e-learning programs to educate our clients in our approach. Our seminars and e-learning programs specialize in

- procedures and documentation
- quality and system and training documentation
- Web content and navigation design, and
- business communications.

Our private seminars, available at your location at your convenience, can be customized to meet your specific goals and objectives. Private seminars are the most cost-effective method for training a number of employees.

Organizations planning to train 100 or more can enroll their instructors in our Instructor Certification Program. Certified instructors, using licensed seminar materials, offer the most cost-effective and convenient training option available.

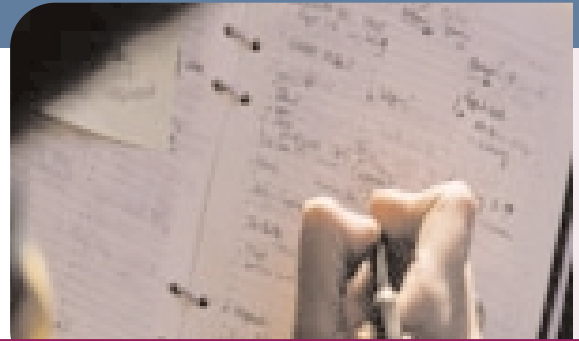
## Results

After using the Information Mapping® method, our clients have realized the following results:

- 54% decrease in error rates
- 70% fewer questions to supervisors
- 83% decrease in first draft development time
- 10-50% decrease in training time
- 30% reduction in reading time, and
- 80% decrease in customer service calls.

## About Us

Information Mapping, Inc. is a professional services firm with over 30 years experience helping the world's leading organizations leverage knowledge to improve performance. We help organizations develop effective Web content, custom training and performance support solutions, procedures and documentation, and business communications. Our headquarters are in Waltham, Massachusetts with regional offices across the United States. We are represented in over 30 countries worldwide and offer our solutions in many languages.



## Improving Sales and Product Training

### An Interactive Hands-On Approach

A large financial institution contacted Information Mapping to create a series of Self-Study guides that would provide both sales training and product training for new and experienced Financial Advisors. The training materials were to be designed so they would serve as a reference tool once the training was completed.

An additional challenge in this project was to present the technical information in a manner that was "fun and interesting."

Instructional Designers at Information Mapping met the challenge by developing a creative client-centered approach. This approach integrated the sales and product training, and provided easily accessible technical information. Engaging interactive scenarios completed the package, making the training practical and hands-on.

The client was "very impressed" with this fresh approach to sales and product training. The Self-Study guides and Job Aids have become the standard issue training materials for this company's Financial Advisors.

## Our Unique Content Method

Information Mapping's solutions are rooted in the Information Mapping method, which is a scientific way to analyze, organize, and present electronic and printed content based on modern principles of knowledge and knowledge management. Our first client, the Department of Defense, used our unique method to reduce training time and errors and increased over-all comprehension. We continue to apply the principles of the method and have helped many clients create standardized, high-quality, and structured content to meet their performance challenges.