

Training for Success: Balancing Compliance and Professional Development

Presented by: **Brianna O'Hara & Katie Koloj**



Presenting Today



Brianna O'Hara

Product Marketing Manager
BizLibrary



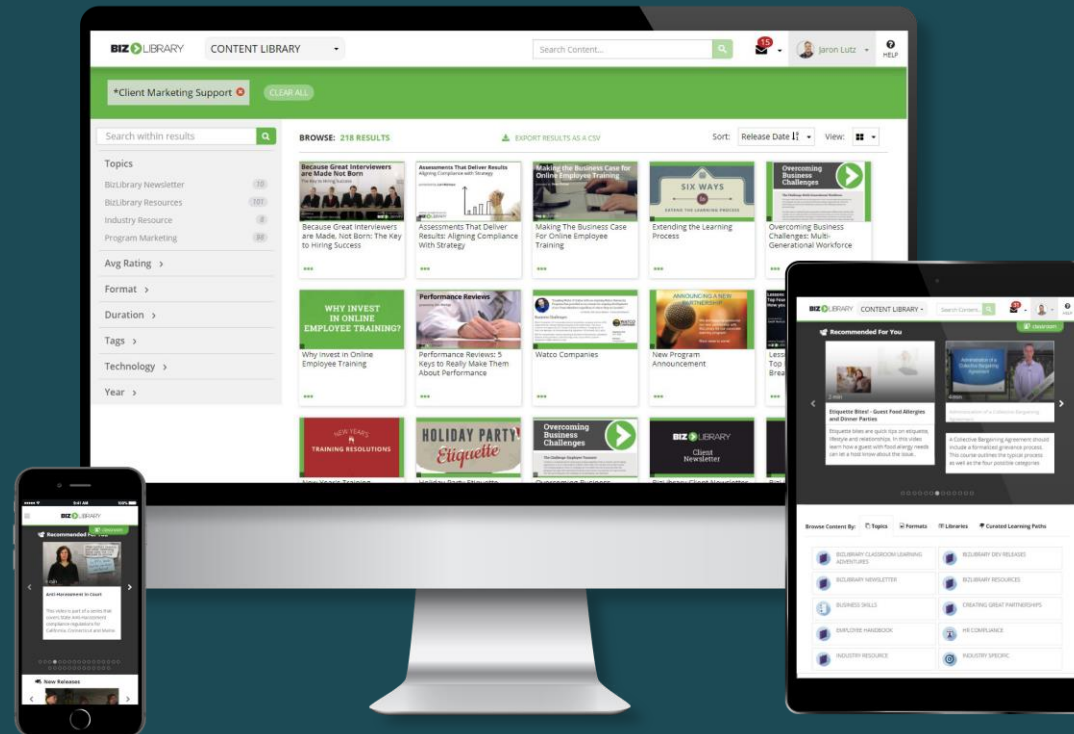
Katie Koloj

Product Marketing Specialist
BizLibrary



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Traditional Training

Mandatory

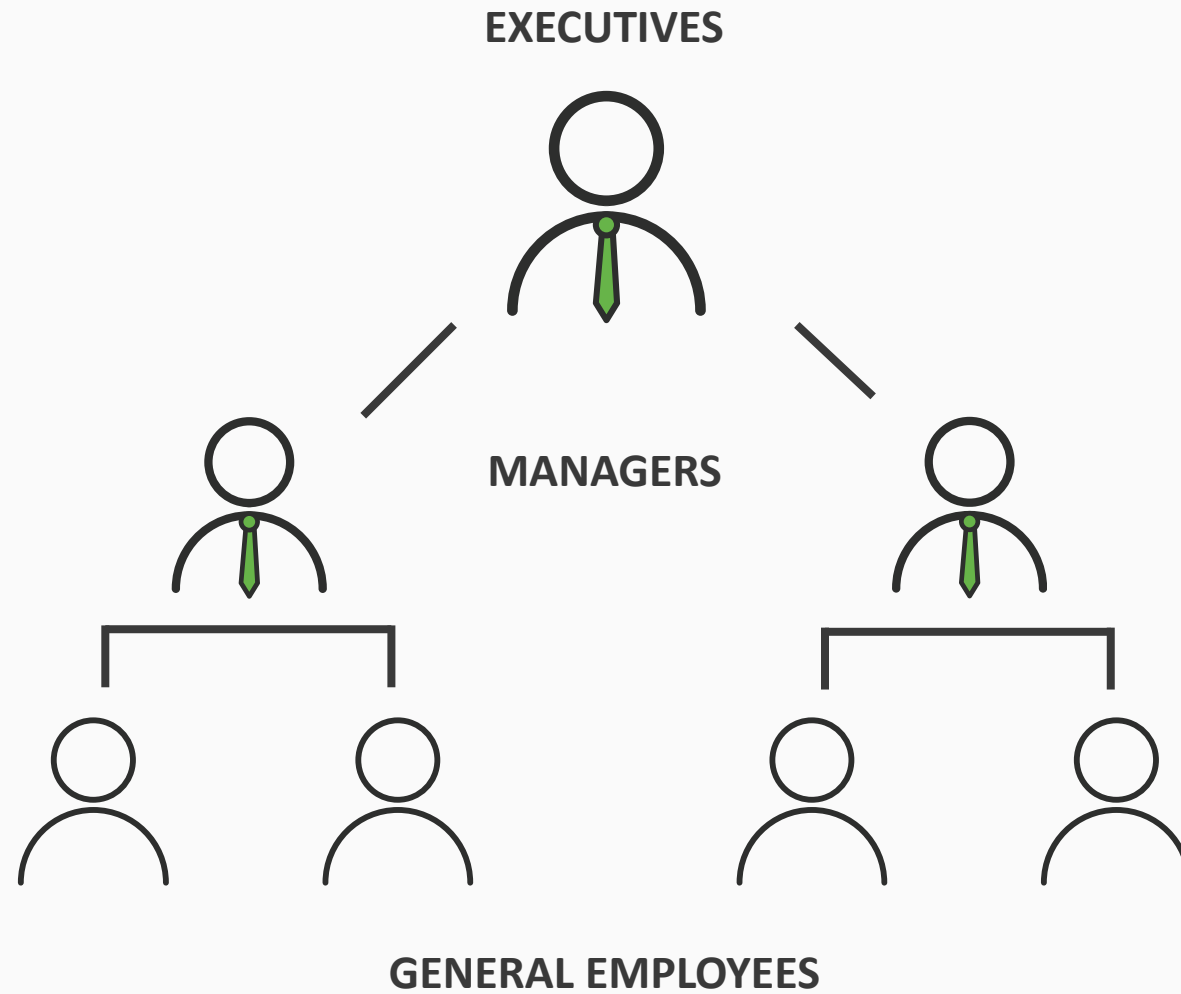
Dated look and feel

Heavy focus on
compliance training

Training Today

Balance of
Compliance training
&
Professional
Development training

Who needs training?



What is compliance training?

Compliance training is mandatory training that covers basic laws and regulations.

- Consumer Financial Protection Bureau (CFPB)
- Right to Financial Privacy Act (RFPA)
- Federal Deposit Insurance Corporation (FDIC)
- Equal Opportunity Act
- Anti-Money Laundering (AML)
- Anti-harassment
- Safety & security



What is professional development training?



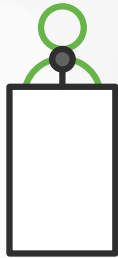
CUSTOMER SERVICE



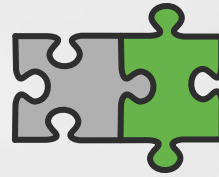
COMMUNICATION



MANAGEMENT



PRESENTATION SKILLS



TEAMWORK



SELF DEVELOPMENT

Benefits of Compliance Training

Minimizes risk

Reduces injury

Improves productivity

Helps avoid lawsuits

Protects employees

Reputation management

Saves money

Protects customers

Ensures process procedures are followed correctly

Provides a safe work environment



Benefits of Professional Development Training

Improves communication

Improves employee retention

Improves customer retention

Improves agility

Helps Stay updated on industry trends

Increases process efficiency

Reputation management

Motivates employees

Gives a competitive advantage

Increases job satisfaction

Improves employee morale

Allows for succession planning

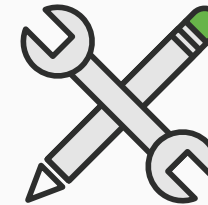


Balancing Your Training

The Balancing Act



COMPLIANCE



PROFESSIONAL DEVELOPMENT

Balancing Training: Compliance

Compliance Training

- 1. Determine what training is required for your organization**
- 2. Determine what your employees know**
- 3. Create a timeline**



Balancing Training: Professional Development

Professional Development Training

1. What skills your employees need
2. Evaluate employees' strengths and skill gaps
3. Set up SMART goals

Specific

Measurable

Attainable

Relevant

Time-bound



Choosing your training methods



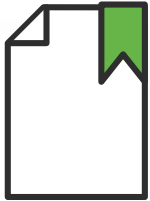
IN-PERSON



VIDEO



AUDIO



EBOOKS



INTERACTIVE LEARNING



AI

Choosing your training methods

Things to consider when budgeting:

1. Number of learners
2. Content costs
3. Instructor Costs
4. Learning management solution costs



3 Statistics for your leadership team

58%

High EQ can be attributed to about 58% of success in all types of jobs.

6

minutes

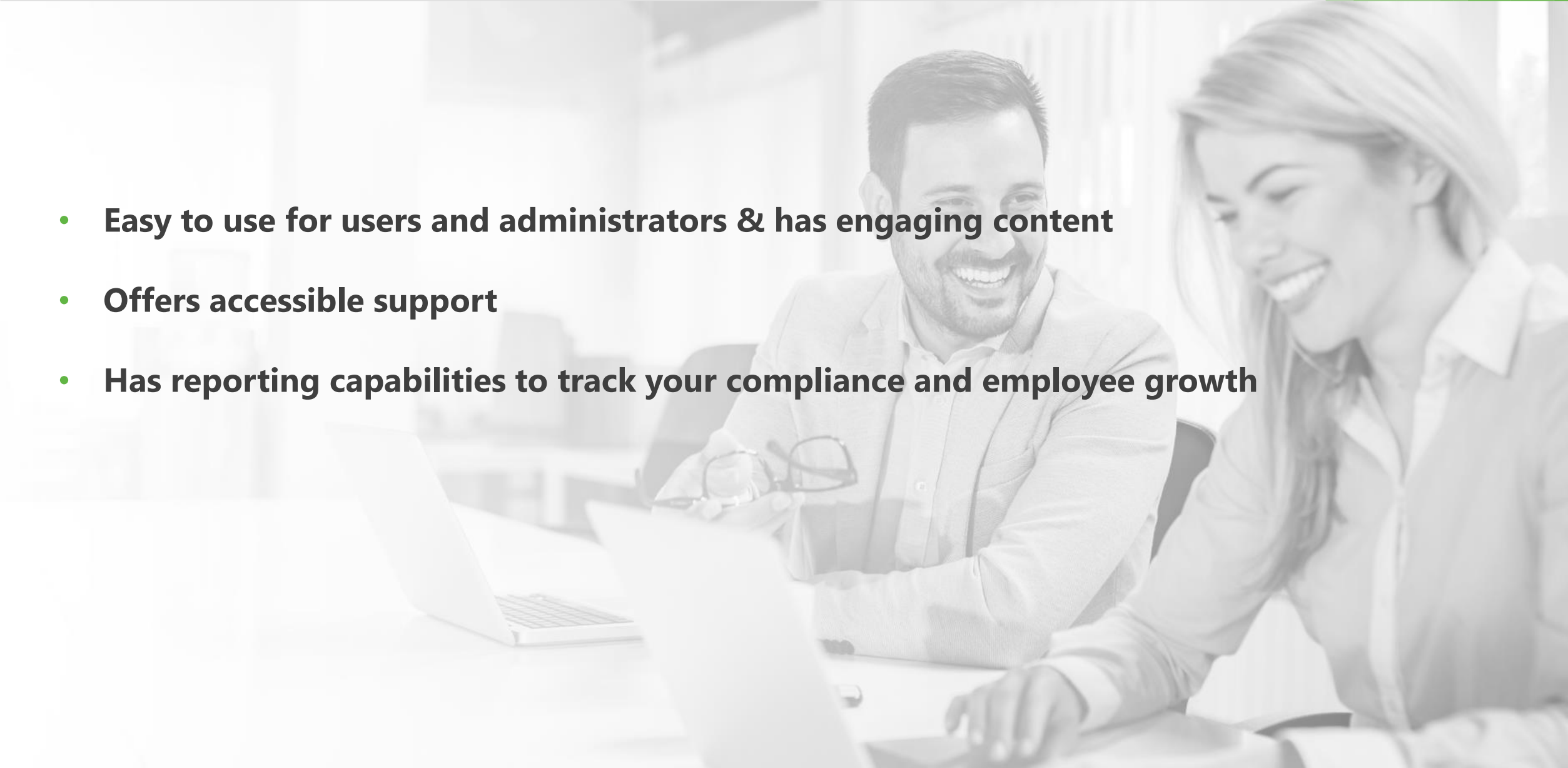
Organizations provide, on average, six minutes of training per employee every six months.

70%

70% of employees say that job-related training and development directly influences their decision to stay with a company or not.

Choosing your training methods

- **Easy to use for users and administrators & has engaging content**
- **Offers accessible support**
- **Has reporting capabilities to track your compliance and employee growth**



Key Takeaways

- Compliance training and professional development training are very different, but both deeply affect your organization's success
- Different ways to balance your compliance and professional development training
- 3 tips when choosing your training methods

The background of the slide features a teal-colored overlay with a pattern of numerous hands raised in the air, suggesting a Q&A session or a public meeting. The hands are of various skin tones and are positioned at different heights, creating a sense of collective participation.

Questions?

Interested in next steps?

Click on the link in the group chat or answer the poll, and a learning specialist will reach out to schedule a more in-depth demo of the BizLibrary solution.



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Brianna O'Hara

Content & Creative Manager
BizLibrary



Katie Koloj

Product Marketing Specialist
BizLibrary

