



People's Trust Group

SUCCESS STORY

When you are a smaller player in a marketplace dominated by massive corporations, you need to have something that none of your competitors have in order to stay competitive. In People's Trust's case, their smaller size allows them to maintain a more personal connection with their clients and deliver something that is normally lacking – quality.



People's Trust Group
Vancouver, BC, Canada

Type
Finance

Web Site
www.peoplestrust.com

Employees
120+

Months using SkyPrep
14

Number of Courses
25+

THE CUSTOMER

People's Trust Group is a Canadian financial institution dealing with a wide variety of services including mortgages, high-value transactions, mortgages, and card services. Being a smaller company in a marketplace dominated by large institutions, it might be difficult to understand how they are able to prosper year after year. The answer is simple: they bring an ingredient to the table that often seems to be in short supply – quality. As a leader in the financial sector they need to ensure that everything is state-of-the-art in order to remain competitive, and more importantly, to ensure that all information remains confidential.

THE CHALLENGE

Being a financial institution, People's Trust needs to be sure that everything, especially software, is up to date. If non-current software is being used, vulnerabilities can become exploited due to quickly changing technology.

The big thing was keeping everything up to date for security reasons because we are a financial institution and we do hold card holder data. –Martin Charnell, Information Services & Business Analyst, People's Trust

That is exactly what happened with their previous training platform – it was no longer current, prompting People's Group to search for a platform that was state-of-the-art, easy to implement, affordable, and above all, extremely secure.

Compliance was also a key consideration when choosing a platform. They had to make sure that the platform allowed administrators to track users' progress and was able to generate reports to ensure that all employees were certified in areas that they needed to be – not just for the company's sake, but for their customers' too!

It had to meet our standards for training, so it had to allow certain types of questions, and we had to be able to track our users' progress in the courses that they took.. We have a lot of compliance reasons for making sure that training gets done.

–Martin Charnell, People's Trust

THE SOLUTION

Supervisors previously had to grade everything manually, but with SkyPrep's automatic grading system, the supervisors are able to save a lot of time. When the grading feature is paired with reporting, the time saved is almost tangible. The built-in reporting tool allows administrators to create custom reports about users and

courses, letting them track how people are progressing through important courses, such as how to spot money laundering.

We use SkyPrep for regulatory compliance. For instance, the federal government might say we need to do training on privacy, or since we do a lot of transactions with large dollar amounts, we have to be weary of money laundering, meaning we have to do a course on money laundering. SkyPrep allows us to offer those courses, do the training, and report back to our auditors that we are doing the training and show that we have a record of it.

– Martin Charnell, People’s Trust

The SkyPrep platform is also SSL certified, meeting the security requirements that People’s Trust needed. However, People’s Group also required Single Sign On implementation. At the time, SkyPrep did not have internal SSO capabilities, but knowing how important it was for People’s Group, they managed to find a workaround. By implementing SAML for People’s Group, their desire for an SSO was realized.

The SSO would have had a fee, but that fee was waived. We needed a particular feature that enabled us to know what department a user belonged to when they signed in and passing that data through the provider should have had a fee. SkyPrep worked with them and we ended up with no fee, so that was great.

– Martin Charnell, People’s Trust



“SkyPrep exceeded our expectations and ensured that we got exactly what we needed.”

THE RESULTS

Thanks to the ease of creating custom courses, People's Trust is now able to easily train their employees in the areas required to be compliant. Furthermore, not only are the employees compliant, but People's Trust can use the reporting feature to prove to auditors that everyone has gone through and passed all the necessary training.

We have annual compliance requirements, probably around seven or so, that you have to do annually for every department.

–Martin Charnell, People's Trust

Furthermore, SkyPrep's flexibility allowed People's Trust to branch away from strictly regulatory training to more ad hoc uses such as general telephone training, among other things.

We have also started pushing out actual knowledge based documents. We have created stuff like short videos of how to use our new phone system and we have been pushing that to all users. So when someone says "I don't know how to use my phone", we can look and say "well, you didn't even look at the video."

–Martin Charnell, People's Trust

Most companies have some sort of hierarchy, and People's Trust is no different! They needed a way for different department managers to control their own section of users and have content that only their sections could see.

We needed user and manager sets so that the manager of HR could create courses and the manager of Legal could create courses, and so on, and not have cross-contamination of courses. You guys set up multiple platforms that pushed up to the main one, so that worked extremely well.

–Martin Charnell, People's Trust



550 Queen St E, Suite 335
Toronto, Ontario
Canada – M5A 1V2

Toll-Free: 1-855-SKY-PREP
International: 1-905-695-9135

Email: info@skyprep.com