



Delivering Training To Internal Employees And External Channel Partners

Customer Profile

UTI Mutual Funds India is the top mutual fund investment company among mutual funds companies in India. It has a balanced and well-diversified portfolio for all the funds and a rigorous in-house research based approach to all its investments. It is committed to adopt and maintain good fund management practices and a process based investment management.

Business Needs

The nature of UTI MF's business means thriving in a dynamic environment driven by several favorable economic and demographic factors and at the same time being vulnerable to economic turbulences. With the demand for Mutual Funds and investments in a constants flux, it is imperative for UTI MF to continuously renovate itself and its products and services to harness this changing environment.

Hence, UTIMF was in search of a system that could cater to the constantly changing training and development needs of its internal employees, external channel partners and advisors. The aim was to keep these individuals updated not just with its new products and services, but also with other Finance and Funds related information.

Client Speak

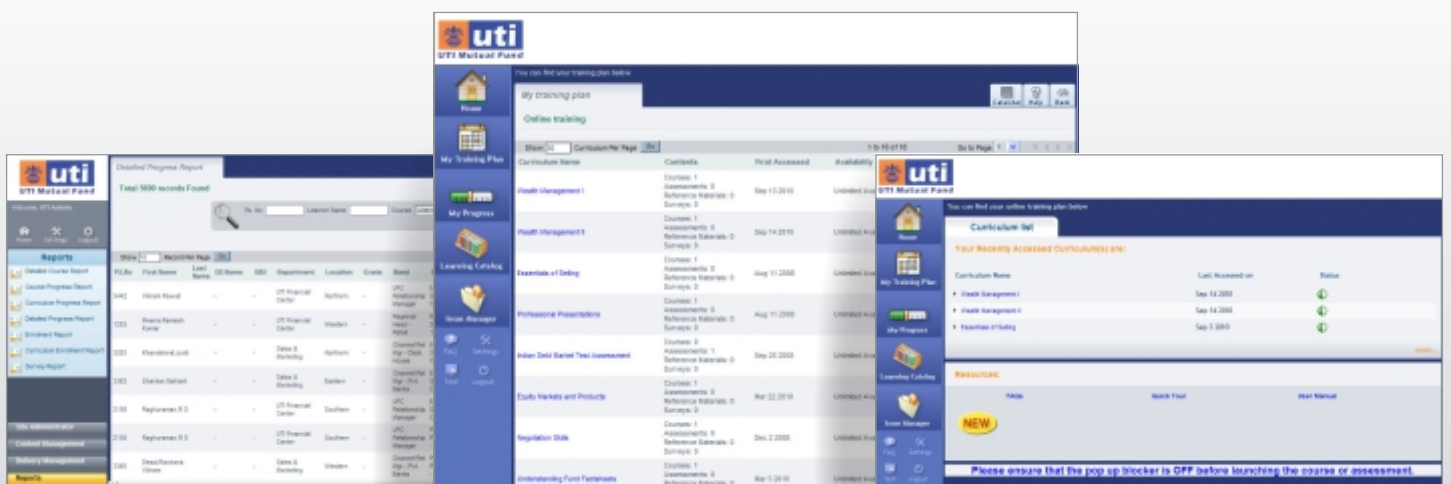
“During the period the LMS has been implemented and put to use, we have had a good experience. The support team set up by Upside Learning to manage and run the system has been very responsive and quick to carry out our needs/resolve minor issues to ensure a smooth and efficient running of the system.”

S.Ganesh,
Sr. Vice President,
Dept. of Sales & Marketing,
UTIMF, India.

The Solution

To meet UTI MF's needs of online development and training, Upside Learning offered its multi-award-winning, best value Learning Management System – UpsideLMS.

UpsideLMS provided a centralized eLearning delivery platform which enabled UTI MF to control, deliver and



manage eLearning courses to its employees in office, and channel partners and advisors situated in different locations. A centralized platform meant that UTI MF could keep a better track of its multiple training programs making the overall training function coherent and easier to manage, carrying less administrative cost

Further, for each of its channel partners which consisted of distributors, registrars and custodians, this implementation allowed UTI MF to maintain a unique portfolio of offerings with channel specific course lists for online training.

UpsideLMS components that were activated for UTI MF were:

- eLearning
- SCORM and AICC compliance
- Assessment , Testing and Survey Module
- Curriculum structure for unified delivery of learning material
- Helpdesk and Client machine diagnostics module
- MIS reports with some custom built reports

Upside Learning Differentiator

Upside Learning worked closely with UTI MF to customize UpsideLMS as per its specific functional requirements. As a result Upside Learning has been able to implement UTI MF's unique needs to deliver eLearning solutions for individual channel partners. At the same time, UpsideLMS' SCORM and AICC compliance allowed UTI MF to run courses from various course vendors.

UpsideLMS' assessment engine was used extensively for conducting assessments of all learners. Further, the appraisal of its employees was directly linked to the results of these assessments.

With a number of standard built-in reports and a few custom built reports, UpsideLMS' MIS and Reporting module helped UTI MF monitor its learners' progress effectively.

Further value add was brought about by Upside Learning's catalog courses on Banking and Finance which were again delivered through UpsideLMS.

UpsideLMS has been helping UTI MF manage the training and development needs of its various learner groups for the past 3 years and continues to do so even today.

Business Benefits

- **Centralization of training** - With a central system to control, deliver and manage eLearning for its employees, channel partners and other mutual fund advisors, the overall training function became very coherent and easier to manage, carrying less administrative cost.
- **Increased training efficiency** - A facility to maintain channel specific course portfolio for each channel ensured that the individual channel partner received appropriate training in line with its requirement.
- **High flexibility** - Flexibility at Upside Learning's end to customize UpsideLMS for minor (and major) needs has also proved highly effective to meet UTI MF's varying needs from the same platform.
- **Increased efficiency in employee appraisal** - With UTI MF's employee appraisals being directly linked to the results of assessments carried out using UpsideLMS, the entire appraisal procedure became simpler and efficient.

Technical Specifications

UpsideLMS runs on Apache Tomcat 6.0 and MS SQL Server 2005 on a single Windows Server 2003 hosted by Upside Learning.

Highlights

- Extremely user-friendly
- Maintained with channel specific course lists and its details
- Highly secure system
- All assessments conducted through LMS

