



**peopletrust**

# Introduction

- People Trust was established in 2013 as a consultancy focused on **building capability and maximising potential**
- Our service offerings are targeted at both **organisations** and **individuals**
- We assist **organisations**, large and small, by providing customised solutions in **Learning** and **Advisory** to build and enhance their human capital
- We offer learning solutions in two broad areas: (a) **Finance, Risk and Governance**; and (b) **Soft Skills**
- This document outlines:
  - Our learning **solutions** across all levels of employment
  - **Learning paths** and **programs**
  - Our solutions to help organisations **transform** their **learning methodology and delivery** (both immediate and long-term) considering the economic and logistical impact of the **Covid-19 pandemic**

# Focus Areas

# Learning: our areas of focus

## FINANCE, RISK & GOVERNANCE



**Finance & Accounting operations & processes**



**Financial Reporting & GAAP**

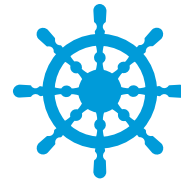


**Banking & Insurance processes & regulations**



**Governance, Risk & Compliance**

## SOFT SKILLS



**LEADERSHIP:** programs for current and aspiring business leaders



**EFFECTIVENESS:** programs for enhancing mid-level managerial effectiveness



**BEHAVIOUR:** programs for developing essential soft skills for beginners

# Finance, Risk & Governance



## 1. FINANCE & ACCOUNTING OPERATIONS & PROCESSES

- Corporate Accounting 101
- Business Process Accounting
- P&L Accounting
- Industry-specific Accounting Processes



## 2. FINANCIAL REPORTING & GAAP

- US GAAP & IFRS Reporting
- Financial & Operating Ratios
- Financial Planning & Analysis
- Financial Reporting in Banking, Financial Services & Insurance



## 3. BANKING & INSURANCE PROCESSES & REGULATIONS

- Banking & Insurance bootcamps
- Managing business process risks in BFSI
- Risk Management in Banking
- Managing digitisation risks
- Credit Risk Management & Collections Management



## 4. GOVERNANCE, RISK & COMPLIANCE

- Internal Controls over Financial Reporting
- Operational Risk & Controls
- Business Process Risks & Controls
- Anti-Money Laundering
- FATCA Compliance

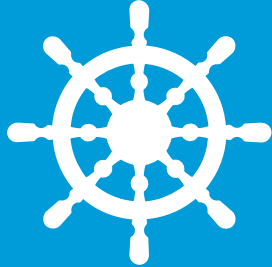
**Our Finance, Risk & Governance programs are conceptualised, designed & delivered in an engaging, interactive format, with real-world references & scenarios at the heart of every module.**

# ‘Learning’, not ‘Training’

We pride ourselves at being able to provide **Learning Solutions**, and not merely deliver training workshops. At the very core of this distinction are our best-in-class **facilitators** who have several years of experience working as management consultants and subject matter experts.



# Soft Skills



## 1. LEADERSHIP

- Stakeholder Management
- Feedback Skills
- Leadership Development
- Successful Solutioning
- Effective Networking
- Conflict Management
- Design Thinking



## 2. EFFECTIVENESS

- Program Management
- Project Management
- Effective Team Management
- Change Management
- Consulting Skills
- Sales Effectiveness
- Performance Management



## 3. BEHAVIOUR

- Corporate Etiquette
- Effective Business Communication
- Effective Reporting
- Public Speaking
- Impactful Presentations
- Working with Global Teams

# Soft Skills: Leadership

Our programs for current and aspiring business leaders include the following:



## STAKEHOLDER MANAGEMENT

**Learning Objective:** Understanding and communicating effectively with stakeholders, translating stakeholder needs into organisational goals, and making this the basis of effective strategy development



## FEEDBACK SKILLS

**Learning Objective:** Building an organisational culture of two-way communication where co-workers can learn something positive from each other in an environment of shared experiences, mutual understanding and respect for each other's opinions



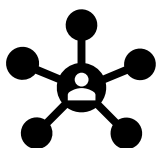
## LEADERSHIP DEVELOPMENT

**Learning Objective:** Instilling key effective leadership skills in current and aspiring leaders, such as communication, inspiration, motivation, decision-making, empathy and accountability



## SUCCESSFUL SOLUTIONING

**Learning Objective:** Honing the strategic ideation, communication and presentation skills of account leads, client solutioning executives and project leaders to help them deliver high quality client pitches, solutioning workshops and presentations



## EFFECTIVE NETWORKING

**Learning Objective:** Helping leaders to develop the ability to identify and make contacts and build long-term business relationships with groups as well as individuals that have shared interests, for mutual benefit



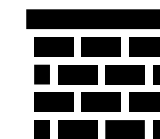
## CONFLICT MANAGEMENT

**Learning Objective:** Developing skills to maximise the positive impact of organisational conflict, enhancing learning and group outcomes and optimising performance



## DESIGN THINKING

**Learning Objective:** Building processes for creative problem-solving by encouraging leaders to focus on the customer, leading to better products, services, and internal processes



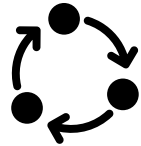
## BUSINESS RESILIENCE

**Learning Objective:** Developing leadership skills to prepare for, foresee, and proactively deal with crisis situations, making decisions before and amid uncertainties, thereby building a resilient business and gaining a competitive advantage



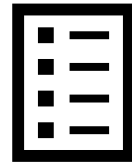
# Soft Skills: Effectiveness

Our programs for enhancing mid-level managerial effectiveness include the following:



## PROGRAM MANAGEMENT

**Learning Objective:** Developing a mindset and the accompanying technical, financial, people and thinking skills to understand and manage large-scale organisational programs



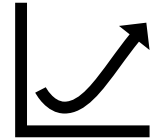
## PROJECT MANAGEMENT

**Learning Objective:** Building skills to successfully lead the work of a team to achieve goals and meet success criteria at specified times within given constraints



## EFFECTIVE TEAM MANAGEMENT

**Learning Objective:** Effectively managing teams of disparate individuals and striking a balance between the attainment of team goals as well as personal goals



## CHANGE MANAGEMENT

**Learning Objective:** Developing a structured approach and methodology to design and implement change within an organisation's internal and external processes, and ensuring a beneficial transition while minimising disruption



## CONSULTING SKILLS

**Learning Objective:** Developing effective consulting skills to identify and solve complex business, organisational and operational problems and define and improve processes



## SALES EFFECTIVENESS

**Learning Objective:** Instilling the approach and skills required to sell successfully with confidence, tactical awareness and clear communication



## PERFORMANCE MANAGEMENT

**Learning Objective:** Building the approach and continuous framework to align the focus of individuals and teams towards specific and structured targets, and recognise and reward improved performance

# Soft Skills: Behaviour

Our programs for developing essential soft skills for beginners include the following:



## CORPORATE ETIQUETTE

**Learning Objective:** Familiarising participants with the importance of etiquette in the corporate (and global) workplace, and the techniques to practice acceptable corporate etiquette



## BUSINESS COMMUNICATION

**Learning Objective:** Familiarising participants with the role effective business communication plays in the workplace, and with techniques to practice effective business communication



## EFFECTIVE REPORTING

**Learning Objective:** Familiarising participants with techniques of effective communication in the context of reporting the outcomes of their work



## PUBLIC SPEAKING

**Learning Objective:** Introducing participants to Public Speaking in the workplace, highlighting the common challenges and techniques for effective public speaking and managing content, time and audiences



## IMPACTFUL PRESENTATIONS

**Learning Objective:** Familiarising participants with the techniques of conceptualizing, creating and delivering impactful presentations in the workplace



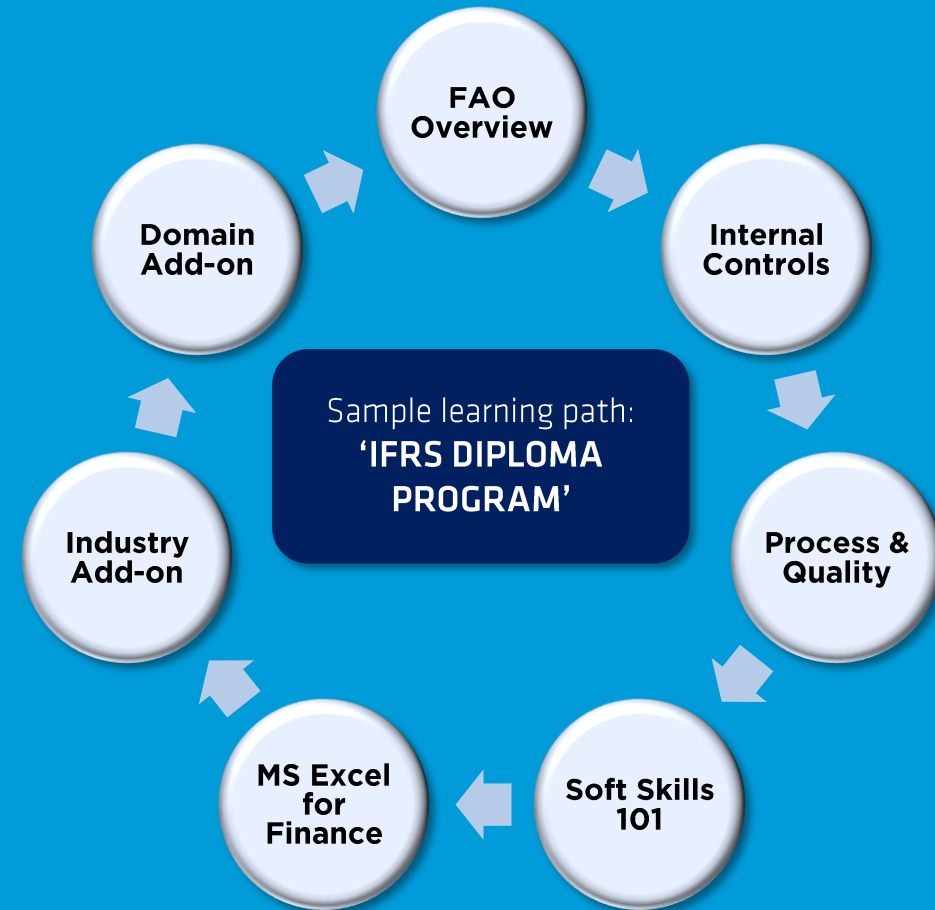
## WORKING WITH GLOBAL TEAMS

**Learning Objective:** Familiarizing participants with the importance of cross-cultural sensitivity and the role it plays in today's global market, and with cultural practices / nuances across geographies (US, UK, Europe, South-East Asia)

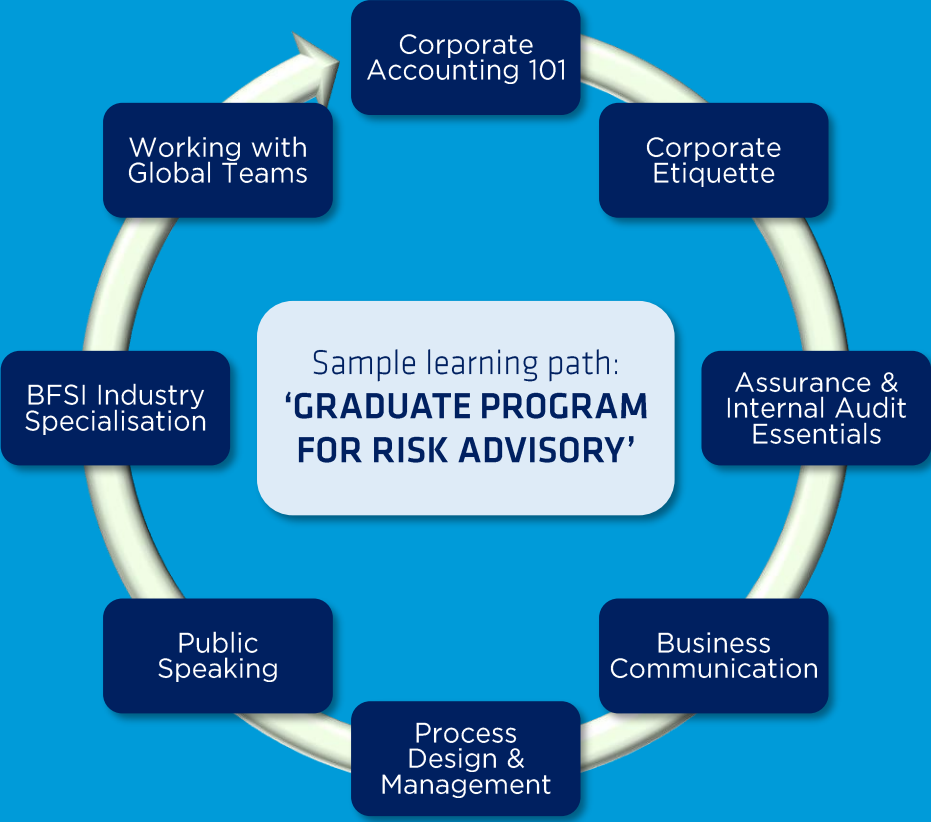
# Learning Paths

In addition to standalone workshops, we curate and deliver longer-term blended skill enhancement programs ('learning paths') to deliver transformative outcomes for participants

Sample learning path:  
**'INSURANCE F&A'**

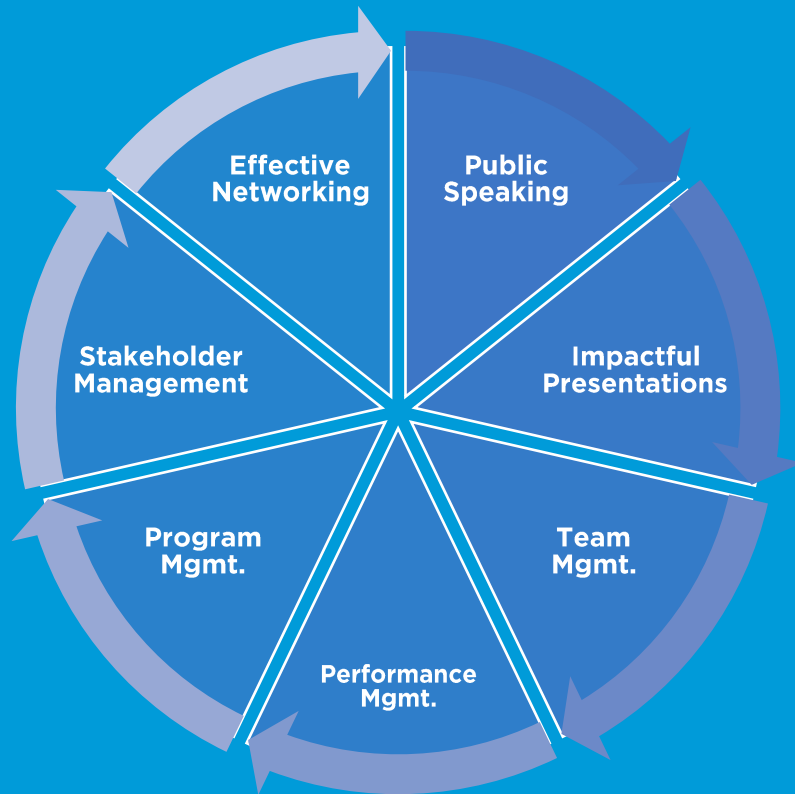


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Sample learning path:  
**'EFFECTIVELY MANAGING YOUR SME'**



Sample learning path:  
**'LEADERSHIP DEVELOPMENT PROGRAM'**



# Approach

# Our Design



## Learning Needs Assessment

We invest adequate time in understanding what learning outcomes are needed and identify the best way to achieve them.

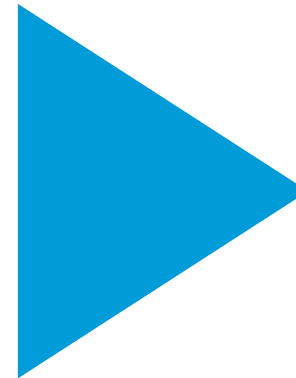
## Baselining Competencies

Thorough pre-workshop proficiency assessments are conducted to understand current competencies and help gauge progress made during a program.

## Customised Content

We do not recycle content. Relevant learning content is developed and vetted by stakeholders before use.

# Our Delivery



## Experiential Learning

Our workshops are not lectures. Case studies and exercises drive the discussion, simulating practical scenarios.

## Expert Facilitators

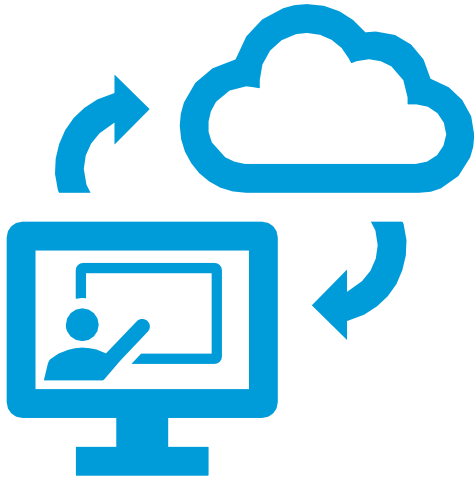
Our facilitators have been there and done that. Experience sharing forms an integral part of the learning experience we offer.

## Continuous Development

Our facilitators assess each participant individually, and where needed, conduct coaching sessions to ensure continuous development.



# Enablers



## **VIRTUAL CLASSROOMS & WEBINARS**

Facilitator-led live learning sessions for attendees from remote locations



## **NANOLEARNING**

Periodic bite-sized eLearning modules (~3 minutes long), delivered by email, in multiple formats, that are convenient to use, and create lasting awareness



## **eLEARNING**

Self-paced, self-study interactive modules for one-time knowledge enhancement / certification



## **TECHNICAL BULLETINS**

Information broadcasts on technical and other updates

# Vision 2020: Online Learning

Our Learning solutions are not limited to physical classroom workshops. We provide a variety of **Creative Classrooms** that can be customised to cater to your organisation's needs.



## Webinars

**High impact knowledge-sharing sessions and seminars hosted online**

Ideal for **wider audiences** (more than 30 participants) for **condensed sessions** (not more than 2 hours in duration).

We use **Google Meet / Microsoft Teams** that allow screen sharing, video uploads and phone / VoIP audio.

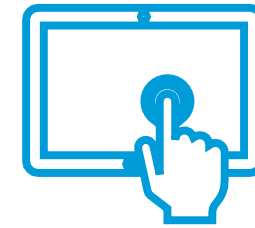


## Virtual Classrooms

**The next best thing to a 'physical workshop'!**

Ideal substitute for **conventional classrooms**. We recommend 4-hour sessions for a group of not more than 30 learners, to **maximise engagement and retention**.

We use market leading Virtual Classroom technology, which supports **interactive whiteboard**, multi-media **content sharing**, **Q&A** and **VoIP audio**.



## eLearning

**Self-paced, self-study interactive modules**

**Gamified interactive e-learning modules** that can be hosted either on our Learning Management System or your organisation's and accessed by anyone, anywhere.

We use **Articulate Online**, a simple easy to access platform to host our customised eLearning content. No software download is required to access the content hosted here.

# Virtual Classrooms



Use of **specialised Virtual Classroom** platforms that allow high levels of interaction with participants and facilitation of activities / assessments during a session



**Half day sessions\*** structured into logical 'segments' to accommodate participant schedules and maximise learning

\* Not exceeding 4 hours in a day



Batches **not exceeding 30 participants** to maximise interaction and engagement



Relevant, **real-world scenarios** and examples to help participants understand a topic and gauge their performance

# eLearning: Services

Bespoke eLearning to complement an organisation's L&D capabilities

## KEY FEATURES

CUSTOMISED CONTENT

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INTERACTIVE DESIGN

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SELF-PACED LEARNING

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REAL-TIME ASSESSMENTS

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LMS HOSTING\*

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LEARNING ANALYTICS\*

## VALUE DELIVERED

- **Relevant, need-based** learning programs (vs. 'off-the-shelf' eLearning modules)
- Use of People Trust's interactive training approach with a **real-world perspective** on learning
- **Self-paced programs** that replace the 'classroom' and allow participants to learn at their own pace
- **Gamified learning** along with built-in assessments help participants gain value through the learning path
- **Content hosting** and **user administration** minimises outlay on IT infrastructure\*
- Detailed **reporting** helps analyse learner progress and performance\*

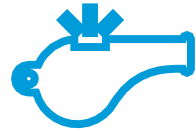
\* For organisations who require LMS hosting services

# eLearning: Credentials

## INTERNAL COMPLIANCE & HR



**Code of  
Conduct &  
Ethics**



**Whistle-  
blower Policy**



**Data Privacy  
(GDPR)**



**Travel & Visa  
Policy**



**Feedback  
Skills**



**Document  
Management**



**AML**



**Finance  
Essentials**



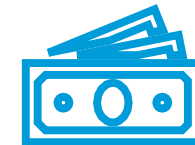
**Internal  
Controls**



**Revenue  
Recognition**



**Lean Six  
Sigma**



**Finance &  
Accounting**

## TECHNICAL SUBJECTS

# eLearning: Sample



People Trust has designed and developed a variety of eLearning content for clients across industries, spanning technical topics (e.g. Finance & Accounting, Anti-Money Laundering, Six Sigma), behavioural subjects (e.g. Feedback Skills, Business Communications) and organisational Governance and Compliance-related topics (e.g. Code of Conduct & Ethics, Data Privacy, Whistle Blower Policy).

We utilise a blend of theoretical content, interactive scenarios and assessments to ensure that these modules are effective and easy to understand.

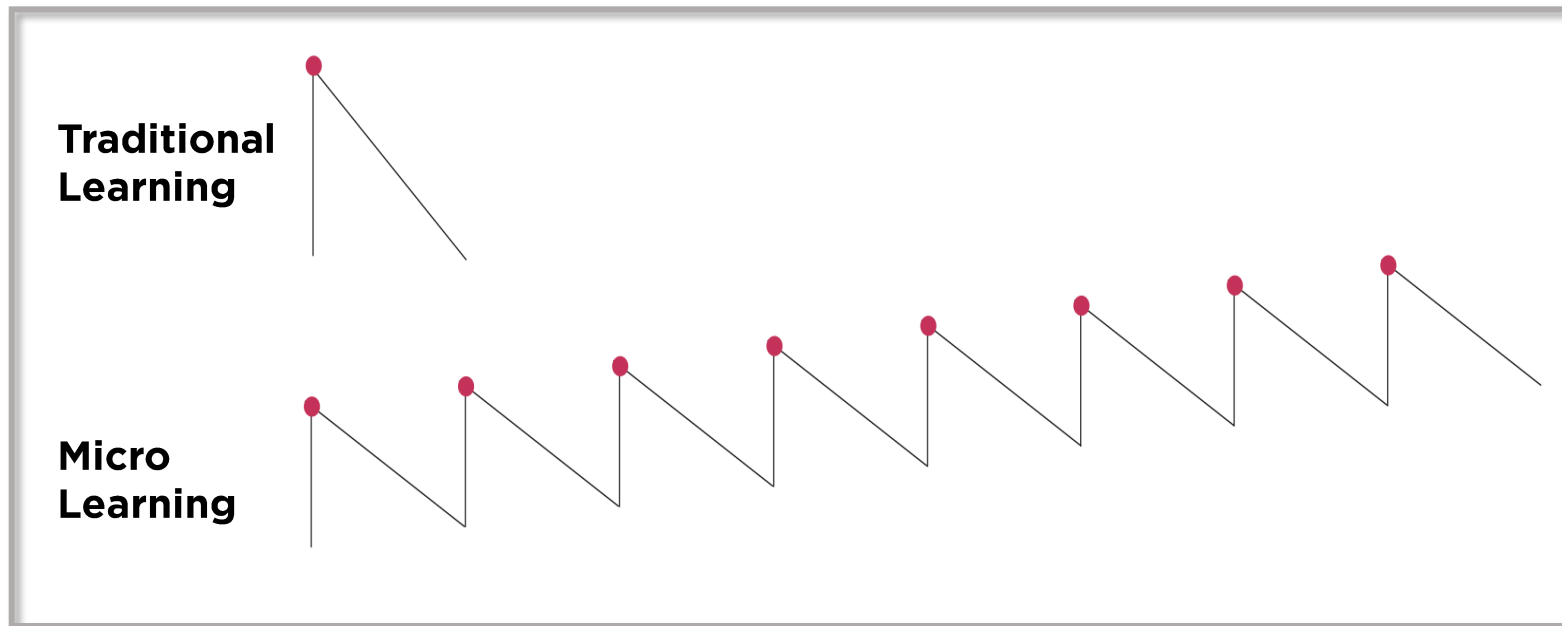
[Click here](#) to view how we incorporate real-world scenarios in our interactive eLearning modules.

# NanoLearning

NanoLearning, as the name suggests, is a **continuous bite-sized awareness** process based on a series of brief **5-7-minute lessons** delivered all-year-round, resulting in all-year-round awareness and more satisfied users.

As humans, as soon as we have learned something, we start a biological process of forgetting and become less alert. To counter the forgetting and downward alertness-curve, we need a continuous, all-year-round process. The method is based on learning research, such as **spaced repetition**, **spacing effect**, and **retrieval practice** to maximise learning, alertness and counter the forgetting curve.

Taking a large 'dose' of lessons once a year may, for certain subjects, fail to provide **meaningful retention of knowledge** which translates to 'Awareness' as illustrated in the diagram below:



- **96.8%** of users **recalled** their NanoLearning lessons during work
- **97.8%** of users liked that the lessons were **short**
- **95.6%** of users liked that the lessons were **delivered by e-mail**
- **100%** of users said the **content** had a good level
- **96.8%** of users would **recommend** the method

# NanoLearning: Advantages



With NanoLearning, People Trust can do the following:

- Develop, update or customise content in **minutes**
- **Deliver content proactively** to end-users via e-mail, internal social media, portals or SMS
- Benefit from a responsive design that is **mobile-friendly** and platform agnostic both for admin and end-users
- Integrate with Microsoft Azure Active directory or OKTA for complete **user management automation** to save you time
- Integrate with Microsoft AI technologies to deliver text-based content via speech synthesis in **45 languages**
- Utilise **automated translation** via Microsoft AI, Google Translate or agency translation workflows
- Integrate with Shutterstock for purchase of **visual assets** from within the content editor



# Success Stories



## Design & Implementation of an organisation-wide capability development 'Centre of Excellence'

In a project spanning over a year, we conceptualised, designed and assisted with the implementation of a Capability Development Centre of Excellence for the F&A Outsourcing business of a large global Outsourcing, Analytics & Consulting company.

The People Trust team conducted a thorough needs and gap analysis, benchmarking with industry leaders and developed leading-edge capability development programs and initiatives, while building an organisational structure to sustain the growth and development of this Centre of Excellence.



## Assisting business leaders from across multiple functions with successful solutioning

Our client, a leading outsourcing and consulting company approached us to design and implement a comprehensive learning environment that would help business leaders across verticals build effective solutioning skills and help increase the success rate when pitching solutions to potential customers.

People Trust designed and delivered a learning solution that comprised of a handbook, an e-learning module, a video guide and classroom sessions.

People Trust's understanding of the client's business and focus on relevant, real-world challenges helped in making the overall program, an effective one.



## Transforming fresh graduates into project-ready management consultants

We were approached by our client, the Risk Advisory practice for a prominent Outsourcing & Consulting company with a brief objective - train fresh 'graduate hires' and make them 'project-ready' in less than a year.

People Trust designed and rolled out a comprehensive year-long 'Graduate Program', covering both technical and behavioural topics, focused on building capabilities necessary for working in global client environments.

The success of the Program was validated by all the participants being deployed on projects in the US and the UK and with People Trust being asked to conduct the Program for subsequent batches of graduate hires.



### Helping marketing gurus 'get with the program'

Our client, a global telecom services company had a simple brief – train our Marketing heads in Program Management. The catch? Make it as real as possible.

People Trust worked with the client team in designing a mock 'program' simulating a telecom service launch, from the ground up. Over a two-day period, participants were immersed in the simulated environment, functioning as program teams tasked with the successful launch of a telecom service.

The workshops were a success, meeting its objectives, enabling the participants with knowledge of program management and more importantly, applying program management tools and techniques in their business roles.

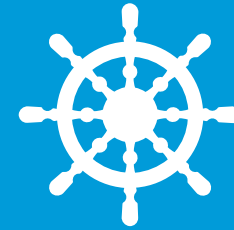


### Driving 'Strategic Performance Management' at an AML regulator

Our client, a Bahrain-based regional anti money laundering regulator overseeing 21 countries, had recently implemented a strategic performance management system to improve individual and departmental productivity, and better engage with its members.

Having never used such a system before, our client was keen to ensure that all employees and stakeholders understood and adopted the system to achieve its intended objective.

People Trust's dual domain experience in AML and Strategic HR enabled us to easily understand the organisation's objectives and requirements, design a simple and effective performance management program & policy, and implement the same via a series of workshops with all stakeholders.



### Improving Leadership performance at a leading garments exporter

Our client, a leading garments exporter in Bangladesh, had been experiencing a decline in performance of its senior executives on account of issues relating to ownership and accountability.

People Trust designed and delivered two short interventions for the client's senior leaders. Using illustrations from other facets of life, we drove home the importance of leading by example, being a brand ambassador, taking ownership, prioritising, and delegating effectively.

The feedback obtained from the participants additionally enabled our client to make certain critical adjustments to its organisational structure and people-related policies.

# Team

# Ratan Postwalla

- Co-founded People Trust in 2013
- Oversees all leadership development initiatives for our clients
- 20+ years as a Consultant in India, USA, UK
- Started career with KPMG
- Held Leadership position at EXL Service
- MBA from Indian School of Business (ISB)

A wearer of many hats, Ratan flawlessly manages his many responsibilities at People Trust. From conceptualising and delivering leadership development programs to mentoring individuals in leadership roles; Ratan has, over the years, strengthened who we are and what we do as an organisation.

Bringing years of global consulting acumen and experience to the table, Ratan's understanding of business models and the challenges they come with provide leadership teams with much-needed practical insights and solutions.

A passionate athlete and true sportsperson, Ratan commits his spare time to several community and charitable sporting initiatives, setting an example for the rest of us to follow.

# Sayak Bhanja

- Co-founded People Trust in 2013
- Responsible for design and delivery of all Learning solutions
- 16+ years as a Consultant in India, UK, APAC
- Started career with PWC
- Held Senior Management position at EXL
- Chartered Accountant

A self-confessed nerd, Sayak's understanding of technical topics and ability to break them down into 'easy-to-apply' concepts is what drives People Trust's Learning business line.

From classroom workshops to cutting-edge eLearning modules, it is this focus on 'learning' (versus training) that defines our capabilities.

Sayak's focused and direct approach to tackling client situations, across business lines, brings a method to the madness that is management consulting.

An avid consumer of fiction, both on print and film, Sayak's ability to incorporate popular references into our Learning content contributes to higher participant engagement, making a workshop a memorable experience for many!



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