

## Longevity and Evolution

- Partner:**
- A hallmark of our client relationships is longevity. Once we start working with a client, we retain the relationship because we allow it to grow and evolve with the client's needs. Fund managers are clients that adapt to their environments constantly which also means their training needs are dynamic as well.
- Tailor:**
- One of our fund manager clients experienced a tremendous growth in assets and an accompanying need to hire more employees. B&B was called in to work with all levels of the organization to figure out where the knowledge gaps existed.
  - We designed a multi-day curriculum spread out across a quarter that detailed financial products and trading strategies specific to the fund manager. The progression and advancement of material over each quarter allowed employees to gain a deeper understanding of their roles within the fund. The curriculum also expanded into a 4-week intensive new hire program.
  - During this period of rapid expansion, we also worked with new hire executives in one-on-one sessions to get them up to speed on changes in market products and financial terminology as well understanding ISDA agreements and derivatives contracts.
- Assess:**
- As the fund manager client expanded rapidly, took on new mandates, and grew to their current size, B&B continued to assess their training needs across the firm. Initially, B&B focused on induction of new employees to the firm's products. As the firm's mandates expanded, so did the training, to include more products and focus on trading strategies. We expanded our learning arenas to include instructor-led full-day courses, shorter seminars, one-one-one sessions, and the creation of a library of financial information and webinars. The goal of empowering the fund's employees with financial market knowledge has been achieved and continues as the population and needs change within the firm.

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