

## All in One:

RBC Dominion Securities Uses the Power and Flexibility of nowIknow to Deploy a Centralized Online Help System





Customer:	RBC Dominion Securities
Geography:	Canada
Industry:	Financial Services
Challenges:	To have accurate and up-to-date processes, policies, and procedures stored centrally and be quickly accessible
Solution:	nowIKnow

## Background

RBC Dominion Securities (RBC DS) is a part of RBC, Canada's most respected corporation as named in a KPMG/Ipsos-Reid survey. With more than 18 million clients worldwide and \$1.6 trillion in assets under management, RBC is Canada's largest bank, as well as fifth largest in North America and 12th largest worldwide based on market capitalization.

## The Challenge

As a large company, RBC relies heavily on its technology framework. Over eighty percent of their applications internal and customized ones that are updated and modified regularly. With these constant changes come a series of constant challenges.

- Accuracy
- Time
- Delivery Model
- Location

### Accuracy

Laurie Miller, Senior Manager, Training Operations and Relations at RBC DS summed up the principle challenges that she and her team have faced: "Each IT group works on its specific applications, changing and enhancing it, but making sure support and user materials are always correct and up to date is challenging without a form of centralization."

### Time

Coupled with these constant changes is the fact that the users – Investment Advisors and their assistants – between watching the markets and dealing with their clients, do not have much time to read user guides. As Miller put it: "Everything needs to be done quickly. So it's very time sensitive material at times."

## Delivery Model

RBC DS was looking to go beyond paper, in more ways than one. The current model was to post electronic user guides to their intranet. "What we wanted to do," elaborated Miller, "was to virtually provide a fun and educational way to learn and understand our technology."

## Location

There are over 4000 users spread out across Canada alone. With any kind of project, this presents logistical considerations.

Having recently joined RBC Dominion Securities, Adam McIntyre brought a fresh perspective and input that positively impacted the end product. As McIntyre recalled: "ClickKnowledge's flexibility was a key ingredient to the project's success. They were able to adapt and adjust to what we needed as well as work with me, bring me up to speed, and then listen to my new take on it. They were then able to adapt the product to new ideas, and change the vision of where it was going. That to me was very helpful."

“You have three different ways to find the information you need, but two different ways to read that information and take it in.”

## The Solution

Based on RBC DS's requirements, ClickKnowledge created an online help system that has since been branded as nowIknow. nowIknow has three main sections, each one offering a different way for the user to access the same information.

### User Guides

For those who want to print or save the information to their desktop, a series of user guides have been repurposed and hosted on the system.

### Online Guide

All of the information from the user guides is compiled into a single online guide. Users can find information through one of the following aids:

- Interactive table of contents
- Index
- Keyword search (users can search globally or within a specific user guide)

## QuickAnswers

QuickAnswers is what users use when they have a question but no idea where to look. QuickAnswers functions like a troubleshooting guide, and asks the user a series of general questions, narrowing down the possibilities until the requested information is found.

## Benefits

The key benefits RBC DS gained from moving to nowIKnow include:

- Control
- Consistency
- Diversity
- Interactivity
- Speed
- Appeal

### Control

Now there is a single and accurate library that everyone can access. Multiple versions of documents have become a thing of the past.

### Consistency

The information is now consistent, and as a result there is also a consistency in the way things are done. Added Miller: "Despite the fact that the processes are not always intuitive, people are now using the technology in a uniform manner, not as policy, but as guides. We're an entrepreneurial business, with many different technological solutions. Our new online help leads them to the proper or recommended processes." Failure to do so in the financial services industry can result in costly errors.

### Diversity

This is not a one-size-fits-all solution. Because there are three ways to find the information, nowIKnow respects the diversity of its users and the way in which they search for and process information.

### Interactivity

Users love nowIKnow's interactivity and "the unique presentation of what are normally very bland user guides," McIntyre pointed out. "You have three different ways to find the information you need, but two different ways to read that information and take it in. And now we're looking to expand on that so there are even more."

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## Speed

Where before users had to leaf through countless pages, not really sure where the information was, now they can click with confidence, and within minutes they have the answer they need. Similarly, Support is now able to respond to queries within a couple of minutes by simply emailing back a link within the online help. The amount of time saved by both users and Support is significant.

## Appeal

"I saw instant rewards for people that were exposed to it," Miller remarked. "The minute people saw it, it was like 'Wow! Where did this come from? This is great! Can I show it to other departments?'"

The net result is a product that has, in McIntyre's words, become "the one stop shop. Rather than having all our user guides spread out through the intranet, we now have one place where everything is logically organized; add in the interactive nature of the online guide, the additional feature of the QuickAnswers, so they are not just reading page after page of user guides. That's what I think we were looking for out of it. And then to have it modeled after and look like it was just something that was created in-house, keeping the consistent look and feel of our branding: company as well as department. It looked like it was a natural fit with other online things that we've got."

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## Looking Forward

"Our team really enjoys working with ClickKnowledge," acknowledged Miller. "I'm very pleased that they introduced the idea to us because it's been a great product. It's still growing. We're only in the infancy stages as far as I can see."

In Fall 2009, RBC DS and ClickKnowledge will team up again to add more enhancements to their version. This is in addition to the user guides and courses that ClickKnowledge is currently creating.

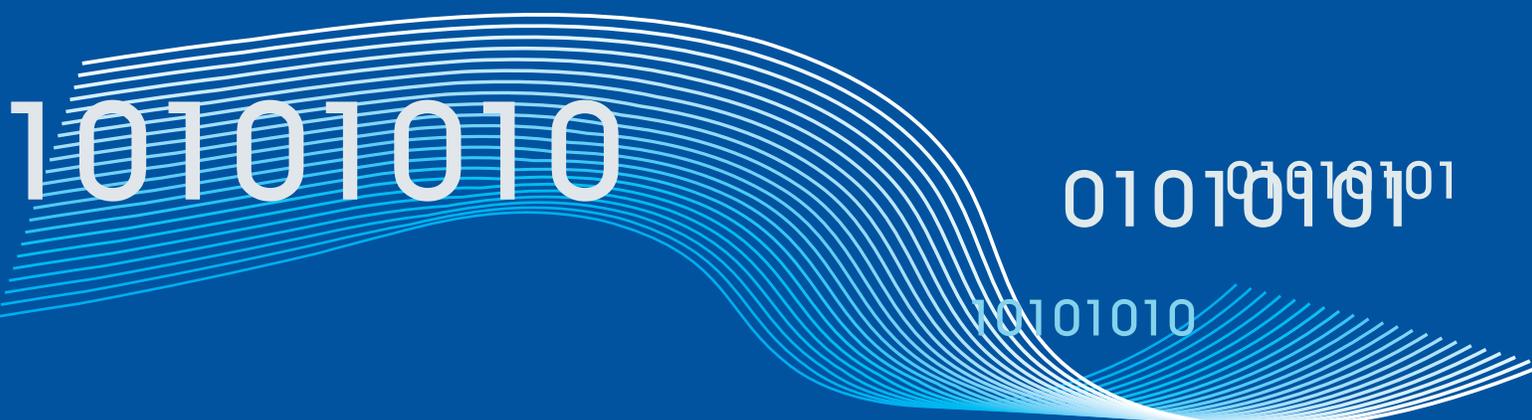
As a concluding remark, Miller added: "I rely on a company like ClickKnowledge. Many companies will supply what the customer thinks they want, but ClickKnowledge challenges us and make us think a little further beyond the 18 month life cycle, so we grow. I think that's something unique, something that's critical to success."

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A decorative graphic at the bottom of the page features a series of white, wavy lines that flow from left to right. Overlaid on these lines are three instances of binary code. The largest, '10101010', is on the left. A smaller '01010101' is on the right, and a third, '10101010', is positioned below the right one.

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