

USE CASE

Eliminating Manual Tracking for Required Compliance Training

CHALLENGES

A national insurance brokerage with more than 450 employees struggled to manage its mandatory annual compliance training. Anti-fraud, data privacy, anti-harassment, and cybersecurity—each training was stored in a different platform, delivered at different times, and tracked through spreadsheets that lived on multiple managers' desktops.

Employees frequently missed deadlines, not because they were unwilling, but because reminders were inconsistent and emails were buried. During a routine compliance review, leadership discovered that nearly 30% of staff had not completed a required training.

SOLUTIONS

After implementing eGoldHub, the brokerage consolidated all mandatory training under a single platform. HR scheduled annual and quarterly training rollouts that automatically assigned courses to the right employees based on role and department. Managers gained real-time insight into who was on track and who needed follow-up. Employees received automated reminders until completion—and they could quickly see which trainings were overdue. Within the first quarter, the organization eliminated spreadsheets entirely and achieved its first-ever 100% on-time completion rate for a compliance cycle.

BENEFITS

Benefit One

Boosts compliance rates with automated, consistent training delivery.

Benefit Two

Eliminates spreadsheets and manual follow-up for HR and managers.

Benefit Three

Provides audit-ready proof of training completion and competency.

AT A GLANCE

Challenges

- Required trainings stored across disconnected systems
- No centralized visibility into completion status
- Hours wasted sending reminders and updating spreadsheets

Benefits

- Automated training assignments based on employee role
- Real-time completion dashboards for managers and HR
- Enhanced reporting capabilities

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