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CAPTRUST

Customer story



Industry

Financial services

Use case

Employee onboarding, compliance training, employee upskilling

Solution

[Absorb LMS](#), [Absorb Create](#),
[Absorb Analyze](#), [Absorb Engage](#)

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Challenge

- Restore trust in centralized learning.
- Streamline course delivery and improve engagement.
- Deliver a consistent training experience that strengthens culture.

Solution

- Absorb LMS as a centralized learning platform.
- Onboarding optimization to drive adoption.
- Absorb Analyze, Engage, and Create for dashboards, reporting, and content creation.
- Training initiatives for knowledge sharing and culture building.

Results

- Improved adoption and engagement across the company.
- Time and cost savings from program and operational efficiencies.
- Improved reporting and deeper insights.

Summary

After unsuccessful experiences with two previous learning platforms, financial services provider CAPTRUST faced in-house skepticism about centralized training and low adoption. To streamline course management and delivery and boost engagement, the company used Absorb to launch onboarding, new hire and HR compliance, and other training initiatives. The company set an ambitious goal of increased adoption within one year and saw increased enrollments, engagements, and efficiencies post-launch. With improved consistency and reporting, the implementation supported business strategic objectives by improving operational excellence and revitalizing company culture.



Leah Hickman

Human Resources Associate II

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The Absorb LMS implementation fostered a vibrant learning environment that strengthened company culture while enabling cost and time-saving efficiencies. Centralized learning with Absorb made a meaningful and long-lasting impact on employees and the company's bottom line.



CAPTRUST adopts Absorb to drive operational excellence and energize company culture

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As with any company in the financial sector, training needs are complex. CAPTRUST employs 1,860 people in various departments, all of whom need specialized expertise and compliance training.

Twice bitten, twice shy

The company had used two learning platforms before, but those experiences had been inconsistent. With fragmented content and a lack of consistency, it was difficult to deliver role-specific and technical knowledge effectively across departments.

“Our trainers at CAPTRUST are subject matter experts, not learning professionals,” says Leah Hickman, Human Resource Associate II at CAPTRUST. “They’d found the previous learning platforms to be cumbersome and inefficient.”

There was a general sense of skepticism around centralized and consistent training at the company. Adoption among learners was low.

On the administrative side, learning platforms weren’t seen as offering substantial benefits. Manual processes and limited reporting capabilities hindered training management and scalability. Those challenges underscored the need for an improved training delivery platform that trainers, learners, subject matter experts, and administrators could get behind.





Increased adoption in 12 months

Hickman and the HR operations team felt the urgency for change and knew the criteria the organization needed to meet. “We needed a **user-friendly, centralized solution** that could streamline training delivery and energize company culture.”

The overall strategic aims were extensive. CAPTRUST wanted to make the delivery, management, and creation of learning content simpler and more efficient. They also wanted **robust reporting** that was accessible to both trainers and administrators. CAPTRUST’s goal was to centralize learning content from HR, IT, Compliance, and other departments to **unify training efforts and enhance program effectiveness**.

The HR team set the goal of creating an easy-to-use platform that would show a **high adoption rate** within the first year. They implemented the Absorb Learning Management System in 2024 and used it to launch the CAPTRUST University 2.0 program in November of that same year.

A strong start with onboarding

As a launchpad for Absorb, Hickman and team chose employee onboarding, a program that incorporated content from HR, IT, Compliance, and other departments. To ease the transition and showcase the new LMS, they included a mandatory tutorial. “We wanted to ensure that new employees interacted with CAPTRUST University right from the start,” says Hickman.

Learners were treated to a centralized and redesigned New Colleague Experience. In contrast to what came before, Absorb Create helped transform live instructor-led sessions into shorter, more concise eLearning modules. This saved learners, administrators, and instructors over **seven hours of training time** per month.

The operations team leveraged Absorb’s **user-import function** to enroll employees in a company-wide, non-harassment training program. The process was efficient, easy-to-use, and provided **robust reporting**.

Hickman’s team made sure trainers understood the value of the employee training platform and engaged with it from the beginning. “They expressed real excitement about features like **auto-filling attendance and assessment tools**,” says Hickman. “They could see how Absorb simplified their roles.”

Large departments such as Institutional Client Service and Operations had run into problems before with fragmented training materials. This time, their learning content was consistent and unified within CAPTRUST university.

“Trainers told us they loved being able to disseminate training to many colleagues (130+) at once using availability and enrollment rules,” says Hickman. “Addressing a group at large instead of one-on-one saved them so much time.”

Dashboard **dynamics**

Building a robust administrator dashboard was a major contributor to CAPTRUST University's overall success. With easy-to-follow instructions and a wealth of resources, it became a central hub for trainers. They used it to access **content delivery guides**, Absorb use cases, **training optimization strategies**, and recordings on Absorb implementation.

Communication about Absorb through the company intranet, was another success factor. Updates told people how to log in and clarified Absorb's purpose and unique value for employees.

Absorb Engage features helped **customize the dashboard** and add interactive elements, making it indispensable to employees. Hickman's team linked the dashboard to CAPTRUST role guides, LinkedIn Learning, and other learning tools. A support ticket system with a dedicated email provided fast responses to technical issues, helping people troubleshoot seamlessly and quickly.





Broadening the platform's reach, the team also successfully integrated various training initiatives into the platform. The programs included professional development training for over 400 managers, lunch-and-learn sessions for CAPTRUST's Young Professionals Network, optional data literacy training, and a Lean Six Sigma certification program, among others. These efforts cemented the value of the LMS and restored faith in centralized learning across the organization.

With eLearning delivered through Absorb's core platform, training was now trackable. Absorb Analyze capabilities optimized reporting and supported improvement and innovation. A comment submitted to Hickman and team by a manager of employee relations summed up the overwhelmingly positive feedback:

"I love how much control we have, how easy it is to manage, and the robust reporting through Analyze."

Off-the-chart results

CAPTRUST set out to increase adoption rates and did so with each employee completing an average of two courses. Other metrics quickly returned impressive results.

Engagement was outstanding in the first few months following program launch, with **99% of colleagues** logging in at least once and 89% using the platform multiple times. Company-wide HR training reached a 73% completion rate in its very first month. CAPTRUST's 1,860 employees enrolled in every type of course offered, showing renewed trust in training using an LMS.

Shorter training sessions were another measurable benefit and saved time for presenters and learners. With only three live training courses instead of eight, presenters **saved 3.5 hours biweekly**, and learners gained two hours. The HR operations team was more productive, too, thanks to automatic enrollment, eLearning, and streamlined reporting.

99%

log ins in the first month

73%

completion rate in the first month

3.5

hours saved biweekly

Operational excellence and revitalized culture

“Since our go-live date in November 2024, we’ve successfully onboarded over 95 colleagues,” says Hickman. A seamless transition for newcomers and **strong overall adoption** underscored the contribution of the LMS to the company’s training and culture-building goals.

Overall, CAPTRUST achieved its strategic objectives of driving operational excellence and energizing company culture. Centralized training **added consistency, reduced manual tasks, and improved operational efficiency**. Enhanced reporting with Absorb Analyze provided the training data and insights the HR operations team needed to optimize course completion and performance and save costs.

Programs such as the Young Professionals Network lunch-and-learn series were well attended (75 employees across 12 sessions), fostering engagement and knowledge sharing. “Building a more engaging work environment is vital for employee retention and contributes to professional development across the company” notes Hickman.





Lessons to **grow on**

For Hickman and colleagues, the experience taught the importance of patience. “The process of transitioning to a new system can be complex and time-consuming,” says Hickman, “so it’s essential to always maintain focus on the end goal and the end user.”

At CAPTRUST, staying focused ensured strategic business objectives were met. The Absorb LMS implementation fostered a **vibrant learning environment** that strengthened company culture while enabling various cost and **time-saving efficiencies**. Centralized learning with Absorb made a meaningful and long-lasting impact on employees and the company’s bottom line.

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