

Intuition Capabilities Overview

Connecting content, learning delivery, and technology.

SERVICE PILLARS

Five, connected

EXPERIENCE

More than 40 years

INCLUDES

Institutional review pack

SECTION ONE

One program across the work

An L&D team can end up managing four or five supplier relationships to support one capability priority. The content, custom course, workshop, and reporting may each work well, while the team still has to make them fit together.

Intuition brings those services together so a program can be designed around the people, the work, and the evidence the business needs. Our financial-services learning experience spans more than 40 years. The value of bringing it together is the continuity between what someone learns, how they practice, and what their manager can observe afterward.

Where the connections matter

Imagine a credit team's development program. Library content can build the financial foundation. Custom cases can introduce the institution's credit process. A workshop can give people practice explaining a recommendation, and their managers can use the same standard to review later work.

STEP ONE

Library content builds the foundation

STEP TWO

Custom cases add the credit process

STEP THREE

A workshop gives people practice

STEP FOUR

Managers review against the same standard

The question for the learning team becomes whether those parts support the same capability. A shared brief and an agreed evidence plan make that possible before delivery begins.

WHAT INTUITION BRINGS

Five connected service pillars

01 Content

Practitioner-built financial-services learning, including the Know-How library, provides the knowledge behind the role. It can support onboarding, specialist development, and ongoing learning as products and requirements change.

02 Custom

Bespoke learning brings your institution's policies, products, processes, and examples into the experience. It gives people a chance to apply general knowledge to the way their own organization works.

03 Classroom

Facilitated learning and workshops create time for practice, discussion, and feedback. Participants can test how they explain a decision and hear how colleagues approach the same problem.

04 Technology and Advisory

The learning environment, integration choices, skills mapping, and measurement approach are considered together. Advisory work helps define the problem, the starting evidence, and the decisions the program should support.

05 Product

Platforms and reusable learning products provide a continuing structure for delivery and support. They give the program somewhere to live between formal sessions and as new cohorts join.

SECTION TWO

Answering what changed

A sponsor may ask what changed because of the training. If each part of the program reports a different activity, L&D has to reconstruct the story after the fact.

An integrated approach begins with a common capability and reporting plan. Content, custom learning, and facilitated work contribute evidence to that plan. The reporting design identifies what can be brought together, which systems hold the data, and who can interpret it. The technical configuration follows those requirements.

An example of a shared evidence plan

For a reconciliation team, the intended capability might be to identify an exception, explain the likely cause, and follow the correct escalation route. Each part of the program has a role in developing and testing it.

EVIDENCE	WHAT THE PROGRAM COULD RECORD	WHO HELPS INTERPRET IT
Participation	Assigned learning and workshop attendance	L&D
Demonstrated capability	Performance on a representative exception case	L&D and the operational subject expert
Application at work	Quality of reasoning and escalation in reviewed work	Team manager
Operational result	Change in an existing measure such as rework	Business owner

That last measure needs a baseline and a review period. A process change, a new system, or a shift in volume could affect it too. An honest report keeps those factors visible.

BEFORE THE PIECES ARE COMMISSIONED

Where advisory helps

DEFINE SUCCESS FIRST

Advisory work helps the team define what success would look like before it commissions the pieces. It also tests whether the learning is being asked to solve a problem that belongs elsewhere.

NAME THE REAL PROBLEM

A colleague who understands the process but can't access the right system needs a different response from someone who hasn't yet learned the process.

WHY SHARED MEASUREMENT EARNS ITS PLACE

This is where the shared measurement approach earns its place. It helps the sponsor see how the parts contribute to one program, and it gives L&D a basis for changing the plan when the evidence points elsewhere.

A QUESTION FOR YOUR TEAM

What would your team need to know at the end of the program to decide whether to extend it, change it, or stop it?

SECTION THREE

Choosing how the services fit

Bringing services together doesn't automatically require a platform move. The deployment choice should follow the institution's learning environment, access requirements, and capacity to support the program.

ROUTE ONE**A program delivered with Intuition**

One option brings the learning content, custom development, facilitated delivery, and supporting technology into a coordinated engagement. It suits a team that wants help carrying the program from design through delivery and review.

Discovery establishes which services belong in the scope, what your internal team retains, and how reporting will work. One delivery plan makes dependencies visible, including content review, manager preparation, and required technical approvals.

ROUTE TWO**Know-How content within your own LMS**

Using Intuition content inside an existing learning management system is a supported route. It allows the learning team to work with its established assignment and reporting processes while adding relevant financial-services content.

The practical questions concern content formats, learner access, updates, and which records your system needs. A combined path may include Know-How material, your own policies, and a practice activity. The design can begin with that path rather than an assumption that the platform must change.

ROUTE THREE**An embedded deployment**

For institutions exploring modules, agents, or insights within their own environment, the discussion starts with architecture and security requirements. A behind-the-firewall approach needs technical scoping to establish feasibility, responsibilities, and what is available for the intended configuration.

The phrase alone doesn't answer where data is processed, which services it touches, or who maintains it. Those questions belong in the review before a deployment is selected.

COMPARING THE OPTIONS

A useful starting brief

A short brief can make the options easier to compare. It should name the priority population, the work people need to do, the learning environment already in place, and the evidence the sponsor needs. It should also identify the people who will review content, coach learners, and approve technical access.

NAME**The priority population****NAME****The work people need to do****NAME****The learning environment in place****NAME****The evidence the sponsor needs**

The Living Skills Framework offers a practical first tool. Its twelve-question audit can help reveal whether the immediate need is a stronger capability standard, better evidence, or a learning path that recognizes what people already know.

SECTION FOUR

Information for institutional review

This page is for the colleagues reviewing a proposed Intuition engagement with L&D. The evidence required depends on the services, content, and deployment being considered. The questions below help define the review request and the supporting documents to ask for.

Data handling and residency

Identify the data the proposed service will receive, where it will be processed and stored, and which parties can access it. The review should cover retention and deletion, transfers between systems, and any use of data by an AI service or subprocessor. Ask for documentation specific to the proposed deployment.

A hosted service, content supplied to your LMS, and an embedded implementation may have different data flows. The review needs to describe the selected arrangement.

Sources, records, and human review

Where AI assistance is in scope, establish which content sources are allowed and how access is enforced. Ask to see how an answer connects to its sources, how source versions are maintained, and what happens when the material is insufficient.

The evidence request should also define which interaction and review records are available, who can retrieve them, and their retention period. Human review responsibilities need to be named for the intended use. A description of source grounding doesn't establish the completeness of an audit record.

Accreditation and continuing education

Where continuing professional development or continuing professional education is a requirement, identify the professional body, jurisdiction, audience, and courses under consideration. Request current confirmation of eligibility, the applicable credit or hours, and the records or certificates required.

Eligibility should be checked for the specific learning being assigned. It should not be assumed to extend to every course, custom activity, or AI interaction in a wider program.

HOW TO START THE REVIEW

Requesting the review material

THE SECURITY AND AUDIT WORKSTREAM

Contact your Intuition account team or info@intuition.com with the proposed scope and your security, accreditation, and audit requirements. Request the applicable security pack and supporting evidence for review by the relevant owners at your institution.

THE LEARNING WORKSTREAM

For the learning workstream, bring the completed Living Skills Framework audit to the same scoping conversation. It helps connect the delivery and review requirements to the capability the program is meant to build.

What to have ready

The proposed scope and services

Your security, accreditation, and audit requirements

The completed twelve-question audit

START THE CONVERSATION

INTUITION INTEGRATED

One capability, one evidence plan, one delivery plan.

Contact your Intuition account team or info@intuition.com with the proposed scope and your security, accreditation, and audit requirements.

PILLARS

**Content, Custom,
Classroom**

AND

**Technology, Advisory,
Product**

BRING FIRST

The completed audit



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