

# Intuition Skills Strategy Guide

Building learning paths from the work people need to do.

## STARTS WITH

**The work, not the title**

## LIBRARY

**692 tutorials, twelve channels**

## FIRST STEP

**One role, worked through**

## SECTION ONE

## What does the role need to be able to do

A job title can stay the same while the work changes around it. A credit analyst who once prepared a report manually may now spend more time checking generated analysis, choosing sources, and explaining where the evidence is weak.

If the learning map still assigns the same courses to that title, it can miss the change. A capability map begins with the work the person needs to perform and the standard their manager needs to see. That gives the learning path something more durable to follow through a reorganization or a change of tools.

**AN ACTIVITY****Complete the AI course**

For the analyst, this is an activity.

**A CAPABILITY****Check the evidence behind a generated credit summary and explain where it needs further review**

It suggests the knowledge, practice, and review the person will need.

## A map with enough detail to use

For a priority role, the map connects four things: a work task, the capability it requires, an example of acceptable performance, and evidence that would show the person can perform it. A manager and subject expert should be able to read it and recognize the job.

**A work task****The capability it requires****An example of acceptable performance****Evidence that shows they can perform it**

## DIFFERENT STARTING POINTS WITHIN ONE ROLE

# One standard, more than one way in

**THE EXPERIENCED COLLEAGUE**

The experienced colleague may know the products, clients, regulators, and unwritten rules while needing support with a new tool.

**THE NEW ENTRANT**

A new entrant may be comfortable with the tool while still learning the product context and the judgment needed to use it well.

These are patterns to explore through assessment. Tenure alone won't tell you what a person knows. Both groups may complete the same course while coming away with very different gaps.

One framework can accommodate those differences. It defines the standard for the role, then lets people enter the learning at the point their evidence supports.

**WHAT THE CONVERSATION REVEALS**

That conversation often reveals a missing assumption. L&D may believe a tutorial covers a skill that the manager expects to see demonstrated in a difficult client conversation. Making the standard explicit gives the team a chance to design the right practice before assigning learning.

## SECTION TWO

## Assess before assigning

Assessment helps avoid asking experienced people to repeat what they know and assuming new entrants have knowledge they haven't yet developed. Its value is in the path it informs.

Know-How's adaptive assessment adjusts questions in response to a learner's answers. It can explore where understanding is secure and where more evidence is needed. The aim is to identify relevant knowledge gaps, with the assessment experience shaped by the responses rather than a fixed sequence for everyone.

### THE LIMITS OF A KNOWLEDGE ASSESSMENT

A knowledge assessment has limits. Being able to explain a concept doesn't establish that someone can apply it under pressure. Where the role calls for judgment, a representative practice task and a qualified reviewer add evidence that questions alone can't provide.

## A baseline that supports development

The useful organizational view is a baseline against the capabilities required for a role. Individual results help tailor the path; the team view shows where learning support is needed. Before assessment begins, people should understand its purpose, who can see the results, and how those results will be used.

**That clarity matters in a financial institution where being tested can feel consequential.** Calling an assessment developmental is only credible if the way the data is used matches that description.

## WHAT THE DIFFERENT PATHS MIGHT CONTAIN

# Two people, two paths, one standard

**AN EXPERIENCED RELATIONSHIP MANAGER**

An experienced relationship manager might demonstrate strong credit knowledge but need practice with a new workflow. Their path can focus on the tool, its limits, and review of the output.

**A NEW COLLEAGUE**

A new colleague may need the underlying financial concepts and supervised practice explaining a recommendation.

Where requirements allow it, demonstrated knowledge can let someone move past optional material. Mandatory learning follows the institution's requirements. A shared practice exercise can then bring colleagues with different strengths together, with each contributing something the other needs.

**THE TEST OF AN ASSESSMENT**

**The result should be visible in the assignment. If everyone receives the same path after assessment, what decision did the assessment change?**

## SECTION THREE

# The material behind the path

Know-How provides 692 tutorials and 65+ hours of video across twelve banking and finance channels, refreshed quarterly. The range lets a path draw from the parts of financial services a role actually touches.

| CHANNEL                                    | A ROLE CONNECTION                                          |
|--------------------------------------------|------------------------------------------------------------|
| <b>Fundamentals of Banking and Finance</b> | Financial fluency for a new joiner                         |
| <b>Capital Markets</b>                     | Instruments and market mechanics for an analyst            |
| <b>Investment Banking</b>                  | Deal knowledge for an early-career banker                  |
| <b>Corporate Banking</b>                   | Credit and financing knowledge for a relationship team     |
| <b>Banking Risk Management</b>             | Risk concepts for business and control colleagues          |
| <b>Investment Management</b>               | Portfolio and performance knowledge for an investment role |
| <b>Private Wealth Management</b>           | Product and client context for a wealth team               |
| <b>Retail and Consumer Banking</b>         | Everyday products and conduct for customer-facing teams    |
| <b>Securities Services</b>                 | The wider transaction process for operations               |
| <b>Sustainability and ESG</b>              | Evidence behind sustainability claims and reporting        |
| <b>AI and FinTech</b>                      | Technology concepts relevant to changing workflows         |
| <b>Regulation and Compliance</b>           | Obligations and escalation in everyday decisions           |

## BRINGING YOUR INSTITUTION INTO THE LEARNING

# Industry knowledge beside your own policy

A path becomes more useful when the industry knowledge sits alongside your own material. A financial concept may be taught through Know-How, while an internal policy explains how the institution applies it and a local case gives the learner a chance to practice.

**KNOW-HOW**

**Teaches the financial concept**

**YOUR POLICY**

**Explains how the institution applies it**

**A LOCAL CASE**

**Gives the learner a chance to practice**

**EVERY SOURCE NEEDS A VERSION AND AN OWNER**

Your policies, procedures, videos, and documents can form part of that design, subject to the content and deployment agreed. Each needs a current version and an owner. Otherwise, a carefully built path can still send someone to an outdated instruction.

**A platform migration isn't an automatic requirement for building the path.**

Know-How content can also be delivered through an existing learning management system. The implementation discussion establishes how the material will be assigned, updated, and tracked in your environment.

## SECTION FOUR

## A first role to work through

For the next planning discussion, one role is enough to make the design concrete. The learning leader, manager, and subject expert can work through a representative task together.

| WHAT TO AGREE                  | WHAT TO BRING                                                  |
|--------------------------------|----------------------------------------------------------------|
| <b>The capability standard</b> | A task the role regularly performs and an example of good work |
| <b>The starting evidence</b>   | Existing assessment findings or a suitable baseline task       |
| <b>The learning path</b>       | Relevant Know-How content and current institutional material   |
| <b>The practice</b>            | An exercise that asks the learner to apply the knowledge       |
| <b>The ongoing owner</b>       | The person who will review the path when the work changes      |

### LEARNING MAY NOT BE THE WHOLE ANSWER

The conversation should allow for the possibility that learning isn't the whole answer. If people know what to do but lack access, time, or a clear process, adding another module is unlikely to resolve the problem.

### What would make the first path worth extending

Before launch, agree how you will judge whether the path is useful. The evidence might include a better explanation on a practice task, less repeated correction, or more appropriate escalation. The manager needs to know what to look for and when the team will review it.

After the first review, the choice becomes easier to explain. You may extend the approach to another role, revise the material, or address a process issue before assigning more learning.

## KEEPING THE PATH USEFUL

## A path can be accurate at launch and lose relevance

A learning path can be accurate at launch and lose relevance as the work changes. Someone needs to know which change should prompt a review, which source needs updating, and whether the practice task still reflects the role.

### THE MAINTENANCE METHOD

The Living Skills Framework covers that maintenance method in detail. It separates lasting anchor capabilities from skills tied to a particular tool or process, then gives the team a way to connect learning evidence to the work.

### BEFORE YOU COMMISSION

Its twelve-question audit is a useful check before a wider skills program is commissioned.

## The tools to use first

The free Living Skills Framework and its audit are the tools we'd want your team to use before a scoping conversation. Begin with the section where your evidence is weakest and bring that result to Intuition at [info@intuition.com](mailto:info@intuition.com).

WHERE THIS GOES NEXT

FREE FROM IKN

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MAP

The role to capability

ASSESS

Before assigning

MAINTAIN

With a named owner



[info@intuition.com](mailto:info@intuition.com)  
[intuitionknowledgenetwork.com](https://intuitionknowledgenetwork.com)