

# » HSBC use eLearning to improve understanding of business continuity «

Serving over 125 million customers worldwide, the HSBC Group has approximately 9,500 offices in 76 countries and territories in Europe, the Asia-Pacific region, the Americas, the Middle East and Africa. With assets of US\$1,502 billion at 31 December 2005, HSBC is one of the world's largest banking and financial services organisations and is marketed worldwide as *The world's local bank*.

## The project driver

Bob Piggott heads up Group Crisis Management for the HSBC Group and manages a team with worldwide responsibility for the bank's business continuity and crisis management plans.

"Up until three years ago, we had recovery plans for our businesses but these had been developed over time in an unstructured manner. We didn't have any standard requirements within the bank which our operating countries could use to either raise their own levels of business continuity knowledge or their understanding of how they should handle an incident" explains Piggott. "As part of addressing that, it became clear that because of the sheer number of employees involved, it would be impractical to train people on a one-to-one basis on the standards we'd introduced."

"The intention behind the eLearning project, therefore, was to put something in place that would both support our written standards and which would also give our local people a consistent training solution which they could use and build upon."

## Identifying a partner

"We could have developed the course within our own team – or perhaps in conjunction with some of the bank's training staff – but you can become very familiar with what you're doing internally" remarks Piggott. "I was concerned that this familiarity might have meant we wouldn't have challenged ourselves sufficiently."

"By dealing with an external firm, we felt we'd get new ideas and new approaches based upon their own experiences of working with other organisations. It proved to be a good idea and it certainly gave the eLearning course much more of a focus."

"We already had experience of working with Siemens Insight Consulting. They'd previously helped our investment bank division develop training modules and there was very positive feedback from the group that used these, so working with Siemens again seemed a good fit. Why not build upon what's proved to be successful?"

## How Siemens helped

"The first thing that I did was to throw a straw man approach down onto the table" recalls Piggott. "This was based on my own thoughts at the time, but it soon became clear from working with Siemens that we could approach things in a totally different way. This is where the use of external consultants proved to be a real benefit."

"We provided Siemens with a copy of our Crisis Management and Business Continuity Functional Instruction Manual (FIM). This is a core aspect of all that we do in terms of business continuity standards as well as reporting and testing infrastructures. The manual includes the messages that we want to get across to people but, as good as they are, I'd question how many people have actually really read them in practice and fully understand them."

"So, it was a case of pulling out the most important points from the FIM and bringing these to life. We did this by introducing connections with real events and employing animation techniques. I must admit I wasn't sure about the use of animation at the outset, but it did prove to work well and, together with the audio commentary, it brought the whole course to life."

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The Siemens team employed a prototyping tool for developing the course content. "This was an excellent approach and gave us the opportunity to go back, to rethink, and, because of the flexibility it afforded, we were able to replace content or change the emphasis in certain areas very easily."

## The benefits

"We've had enough experiences within the bank to show that we need to take business continuity seriously" explains Piggott. "I'm not so worried about our top management because I've already got their buy in. But the more junior members of staff are very much involved in the creation and ongoing maintenance of our plans and we do need to make them feel part of the process. The eLearning course will certainly help us to do this."

"We've also been working very hard to ensure that business continuity is a core part of all our businesses and provides us the resilience to recover from any problems we may face. eLearning will help us here too and ensure our employees realise the important part that they play in dealing with, and recovery from, any incidents. If everybody knows what they're going to do if an incident happens, it puts us in a far better position to react should that eventuality occur."

HSBC wanted a modular structure for the eLearning course to simplify future changes. "The course was put together in such a way that we'll be able to easily tweak it from time to time, include more content, or even add a complete new module" comments Piggott. "I think that's going to be very beneficial because life does change. In five years time, for instance, we may well find that global warming or climate change has had a significant effect. We're already seeing a far higher degree of environmental disasters and we need to keep people's awareness and understanding maintained."

Reflecting on the value of working with Siemens Insight Consulting, Piggott concludes "I suppose at the end of the day their consultants kept me on the straight and narrow. At the outset I thought I knew what I wanted but the Siemens team made me realise what I actually needed - it wasn't quite the same thing. They also introduced techniques and approaches that I hadn't considered and which, in the end product, helped to emphasise what I was trying to achieve but in a far more focused manner."

## Key Features

- eLearning course supports bank's existing Business Continuity Management standards
- Prototyping tool afforded flexible approach to developing course content
- Course will be used by Business Continuity Management staff in all operating countries
- Modular structure allows changes or new content to be added easily
- Course helps staff understand their responsibilities if incidents occur



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