Learn iT!

InfoPath training for Major Investment Services Provider

"I went home so psyched and pumped-up to take our…InfoPath existing forms [and take it] to the next level…Tom [Vorves] was great in teaching us out-of-the-box cool things not just in InfoPath but SharePoint as well…" – Allery, Technical Project Manager, Investment Services Provider

Situation:

This world-renowned investment services provider in securities brokerage and financial services to works directly with millions of people to help manager their money through brokerage, banking and other financial services. They are the industry leader in serving registered investment advisors and manage retirement plans for companies of all sizes.

At the local San Francisco branch, Technical Project Manager, Allery, supports 600+ users and is responsible for project portfolio reporting. Because they use SharePoint as their fundamental collaboration tool, they discovered there was a need to generate reports and to create parameters around the tool. Her department decided to use InfoPath for its ability to collect data, generate reports and overall user-friendly application that simplifies processes, improves productivity, and improve user experience.

Solution:

In the summer of 2007, Allery contacted [Learn iT!](#) to see if they offer training on InfoPath. At the time there were no InfoPath classes offered on a regular basis at Learn iT! so they offered to create a curriculum and provide a private training. With 15-20 registrants confirmed, Learn iT! provided InfoPath training to the company's IT audience. Because of the overwhelming interest and excitement from the IT staff, the training department decided to pick up the cost, utilizing their corporate account with Learn iT! to pay for InfoPath private trainings.

Participants were ecstatic from the training and discussed the value in creating an InfoPath user forum where they discuss best practices, processes and helpful tricks around the tool. Allery created an email distribution list, citing the true value for those who were on the distribution list.

Result:

Allery now sees the added-value of using InfoPath from not only widespread interest throughout the company, but sees how InfoPath is utilized within various departments. At a local level, there are over 600 end-users who use InfoPath as a collaborative tool with SharePoint to store data and generate reports.

Overview:

Customer: Investment Services Provider
Number of Employees: 13,000+
Location: San Francisco, CA
Industry: Financial Services
Solution: custom InfoPath class

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