

Trade Allocation & Position Transfer (Portfolio Sample)

Format. Self-paced eLearning (Storyline 360): scenario + workflow practice + knowledge check + job aid

Audience. Operations/processing staff handling allocation/position transfer requests, including time-sensitive requests near cutoff.

Business problem. In time-sensitive workflows, errors increase when staff rely on urgency/familiarity instead of required validations. This module reinforces validating authorization and critical fields first and routing failures through a consistent control process.

What I built. A short, practice-forward module with three learning beats:

- Scenario practice: 3 decision points + outcome, with immediate Correct/Try Again feedback and two outcome paths (Clean Run vs Coached).
- Workflow reinforcement: Click-to-reveal diagram with 6 step layers.
- Exception recognition: “Spot the exception” activity with targeted feedback for common failure types.

Learning outcomes.

- Validate requester authorization and critical fields (account, quantity, contract/series) before action.
- Identify exceptions correctly: exception = any required validation fails (not just urgency/cutoff).
- Apply the exception control steps: Pause → Validate → Route → Document → Notify.
- Write factual audit trail notes (what happened, impacts, actions, who was notified with timestamps, reference/ticket ID).

Learner assessment. 5-question knowledge check (MC, sequencing, drag-and-drop) with results slide; passing score: 80%.

Tools. Storyline 360 (layers, feedback, click interactions, quiz/results) + end-of-module job aid.

Success.

- Post-training (real workflow): fewer downstream corrections/rework caused by missed control checks (based on operational indicators/KPIs).
- In-module performance: higher first-try accuracy on scenario decisions aligned to the control steps.
- In-module knowledge: quiz pass rate + most-missed questions used to refine content and add short reinforcement where needed.

Next iteration. Replace video placeholders with short “show-me” demos; add a one-page “Exception Controls” checklist; add role-based branching (internal vs external requester / different authorization levels).