System and conversation readiness for financial institutions

Bank learners navigate multiple core systems while managing regulated conversations in real time. Readiness requires both, yet most programs train them separately, or only one. Assima Train and Call Simulator combine two hyper-realistic platforms into a single readiness solution: learners master the system and the conversation before they ever touch a live account or customer.

75% of contact centers report new learners struggle with **system familiarization, the highest** figure on record

3.5% **applications navigated per call** on average, plus 2.3 more after the call

TWO PLATFORMS. ONE READINESS SOLUTION.

SYSTEMS TRAINING

ASSIMA TRAIN

A fully interactive, editable clone of your actual banking applications, not a screenshot. Learners click, navigate, and key data exactly as they would live, with no risk to the production system.

- 4x-patented application cloning, not
- No separate IT training environments to build or maintain
- One-click anonymization replaces PII with risk-free data
- Translate the full UI without re-capturing
- Click- and field-level analytics, no coding required
- Up to 90% less content rework and up to 70% lower training costs

CONVERSATION TRAINING

CALL SIMULATOR

AI conversation practice at enterprise scale. L&D teams build, own, and update scenarios independently, with no vendor queue and no per-scenario fees.

- Scenario Studio™: a live scenario in minutes with GenAI
- AI Coaching™ scores every simulation against your custom rubric
- SimPlayer™ supports voice and chat, including Multi-Chat and Multi-Persona
- Pass/fail thresholds for exact disclosure and script language
- Unlimited simulations, no usage fees

WHAT OUR CLIENTS ARE SAYING

"A game changer. All skills will benefit."

"This is not just for calls. Simulations can easily be built for other areas, such as conversations between an employee and their direct report."

L&D Strategist, Fortune 50 Shipping & Logistics Company

"Practical, interactive, and impactful."

"Immediate feedback from both team members and leaders was overwhelmingly positive. Sparked meaningful conversation, real engagement, and thoughtful dialogue around customer interactions. Exactly what we hoped to create."

Learning Program Manager, Leading Global Airline

"A truly immersive experience for both practice and testing."

"Allows us to scale practice while maintaining consistent quality feedback, reducing cost of tenured employees' time, and reducing impacts to shrinkage."

Head of Learning, Forbes Cloud 100 Company

PROVEN ON BOTH SIDES OF READINESS

Systems readiness: Assima Train

~$3M saved

MAJOR CANADIAN RETAIL BANK

Moved a manual, paper-based mortgage process onto SAP CRM. Trained 2,500 branch staff in six months on interactive clones of the live system, avoiding the cost of building and maintaining a dedicated training client. Delivered in French and English from one set of lessons.

30% faster

GLOBAL RETAIL BANK, GERMAN OPERATIONS

Trained 5,600 staff on a new core banking system across 540 sessions using 450 cloned modules, cutting training development time 30% versus screenshot-based content. Customer names, addresses, and account numbers were anonymized automatically before any training was delivered.

Conversation readiness: Call Simulator

70% → 90%+	<50% → 80%	97%	50%+
Average QA scores within three months of rollout, for new hires and tenured learners alike	Quota attainment for new hires, reached in their first month	Reduction in need for assistance once learners went live	Drop in call transfers and escalations versus trainer-led role-play
Healthcare services company	*Financial services firm*	*Fortune 50 new hire cohort*	*Fortune 50 new hire cohort*

ONE INTEGRATION. BOTH DIMENSIONS OF READINESS.

ASSIMA TRAIN

System data

Every click, field entry, and navigation path through the cloned application. See where learners struggle, which steps they repeat, and how proficiency changes across attempts.

CALL SIMULATOR

Conversation data

AI Coaching results on every simulation: rubric adherence, compliance accuracy, handle time against benchmarks, soft skills, and turn-by-turn audio review.

WHERE BANKS PUT IT TO WORK

New hire onboarding

Learners complete system simulations and live conversation practice before handling a real account. Both readiness scores are visible to L&D on demand.

Compliance retraining

When a policy, product, or system changes, Assima lessons update in minutes and Call Simulator scenarios are live-edited without republishing.

Performance gap analysis

Separate system gaps from conversation gaps, so coaching is targeted and manager time goes to the right problem.

BUILT FOR COMPLIANCE-SENSITIVE ENVIRONMENTS

Exact-language scoring

Rubrics are configurable per scenario, including pass/fail thresholds for required disclosures and scripted language. Misses are flagged turn by turn.

Conversation practice: no live data

Call Simulator runs on synthetic scenarios your team authors. No connection to core banking systems and no customer data required.

System lessons: PII scrubbed

Assima captures interface objects only, never source code or databases. One-click anonymization swaps customer PII for risk-free data in every lesson.

ENTERPRISE-READY SECURITY

	Assima Train	Call Simulator
Information security	ISO/IEC 27001 certified	ISO/IEC 27001 certified
Privacy	ISO/IEC 27701 certified; GDPR compliant	GDPR compliant
Hosting & residency	Microsoft Azure; North America or EU data residency	Google Cloud Platform; North America or EU data residency

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