



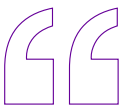
→ Clever Nelly

WHY CLEVER NELLY

Employee knowledge and competence are critical to the success of organisations, and the experience of their valued customers.

Yet the uncomfortable truth is employees can forget a large amount of the training provided to them.

...and NO employee can act on training they have failed to learn or have simply forgotten.



We have not identified a single instance where the AI has failed to improve employee knowledge and positively impact in-role performance.



LAST 30 DAYS

Engagement

92%

↗ +15%

Competency Score

79%

↗ +15%

Excellence Score

56

↘ -5%

Unanswered Questions

8

↗ +15%

WHAT IS CLEVER NELLY?

Clever Nelly, a multi-award-winning Artificial Intelligence tool, was created to guarantee that what you train your people, they learn and retain and translate into in-role competence. Our customers, many of whom are household names, regulated by the markets in which they trade, use Nelly to improve employee compliance, reduce employee risk, and improve individual employee productivity and performance.



HOW IT WORKS

Clever Nelly undertakes a personalised, continual assessment approach, using less than one minute of an employee's working day. Underpinned by the science of learning, applying spaced learning, repetition and self-testing, Clever Nelly improves knowledge and competence in the flow of work. Thus, ensuring every employee learns, retains and most significantly translates often theoretical training into genuine in-role competence.

FEATURES & BENEFITS

- ✓ Quantify and amplify existing investment in L&D
- ✓ Real-time evidence of employee compliance
- ✓ Employee risk quantification
- ✓ Best-in-class regulatory reporting
- ✓ Improve operational KPIs
- ✓ Reduce employee errors
- ✓ Increased speed-to-competence

OUR 4-PHASE APPROACH



Diagnostic

The diagnostic phase uncovers actual levels of employee knowledge and competency.



Knowledge

AI works to close knowledge gaps.



Competence

Translation of knowledge into the desired in-role competence, with an average improvement of 45%.



Performance

Collaboration with functional leaders to understand and target the greatest drivers of value (KPIs) in your business.

SUMMARY

Single-point-in-time training is ineffective, with much of it forgotten, or not embedded in the first place. Competent and high performing employees require gentle, ongoing, continuous assessment to ensure they are equipped to face the challenges dealt to them in-role. Clever Nelly demonstrates the greatest value in evidencing employee compliance, reducing employee risk, whilst simultaneously, quantifiably, and permanently, improving productivity and performance.

Additional Information & FAQ's

Our customers typically deploy Clever Nelly for compliance and/or performance purposes.

DEPLOYING CLEVER NELLY FOR COMPLIANCE

As regulators become increasingly more demanding and data-led, we are proud to provide our customers with best-in-class, granular evidence of authentic employee compliance and lead indicators of employee-based risk.

Clever Nelly enables you to continually assess and improve the competence of your employees in relation to compliance topics. Our customers benefit from daily evidence of maintained competence in relation to compliance, moving away from the outdated, single point in time methods historically used.

Daily assessment highlights risks due to a lack of competence and provides data to the business to support pro-active action, be it additional training, coaching or other intervention.

**V O L V O**

Annual compliance testing targets surpassed by 20%, leading to Clever Nelly being the default mechanism to evidence ongoing competence for regulatory purposes.

**ss&c**

The data evidences competence of 4,500 employees to the regulators and our clients. Culture and competence is key and Nelly is the way to deliver this daily to everybody.

DEPLOYING CLEVER NELLY FOR PERFORMANCE

Nelly for Performance is an approach that centres around having a clear and measurable purpose for implementing Nelly. An approach that drives tangible business benefits, can be tracked every month or quarter and is continually monitored to ensure maximum return on investment.

Nelly for Performance partners you with a member of our Performance Team who will work closely with you and your MI/KPI data to:

- ✓ Identify the areas for the greatest performance improvement
- ✓ Tailor content and questions to target underperformance
- ✓ Analyse and track performance improvement, on a quarterly basis, including ROI measures
- ✓ Review lowest performing questions and provide recommendations for improvement

**LIVE**
LIVERPOOL VICTORIA

Clever Nelly's had more of an impact than we expected. We've seen real changes in employee retention, a reduction in the number of customer complaints and in the amount of rework as well. There have been improvements across the board.

HOW CLEVER NELLY WORKS

Prior to implementing Clever Nelly, we partner with you to understand your objectives for using the tool, whether it be for compliance, performance, or both. We work closely with you to understand your challenges and identify opportunities for improvement. This insight and content provides the basis for your questions in Clever Nelly.



01 DIAGNOSTIC

The diagnostic phase uncovers actual levels of employee knowledge and competency.

Clever Nelly is training content agnostic, supporting all functions and subjects. We create questions based on your training material and Nelly begins by asking just two questions per employee, per day, to baseline actual knowledge.



02 KNOWLEDGE

The AI works to close knowledge gaps. Employees will engage with Clever Nelly on average less than one minute per day.

The AI enables us to personalise the employee experience, focusing on the right area(s) for each employee to bridge any identified knowledge gaps and optimise employee competence.



03 COMPETENCE

Working with you, we will create questions which assess an employee's ability to apply critical knowledge in realistic scenarios relevant to their role.

This process is continuous, increases competence, and ensures you don't simply have theoretical experts, but employees who can operate how you need them to.



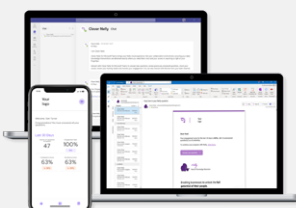
04 PERFORMANCE

We work with you to understand key areas that require attention and improvement.

By repairing and improving individual gaps, the AI transitions knowledge into KPI-centric in-role competence, delivering maximum ROI and performance improvement. We overlay your KPI data with knowledge and competency data to fully demonstrate the impact made.

USER EXPERIENCE

Users of Clever Nelly receive a personalised continuous assessment experience according to their own unique knowledge profile, informed by Clever Nelly's artificial intelligence. They receive their questions via your chosen communication method, e.g. email, within the flow of work.



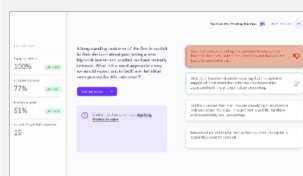
EASY TO ACCESS

Clever Nelly can be deployed using a range of communication mediums, making it simple and accessible for employees to engage with. Typical deployments utilise platforms including email, a dedicated mobile application, Slack, Teams and Zoom.



NO DISRUPTION TO BAU

On average, Clever Nelly uses just 58 seconds of an employee's working day to improve competence within the flow of work.



CONTINUOUS ASSESSMENT

Clever Nelly continually assesses and automatically repairs employee competency gaps through spaced learning, repetition and self-testing.



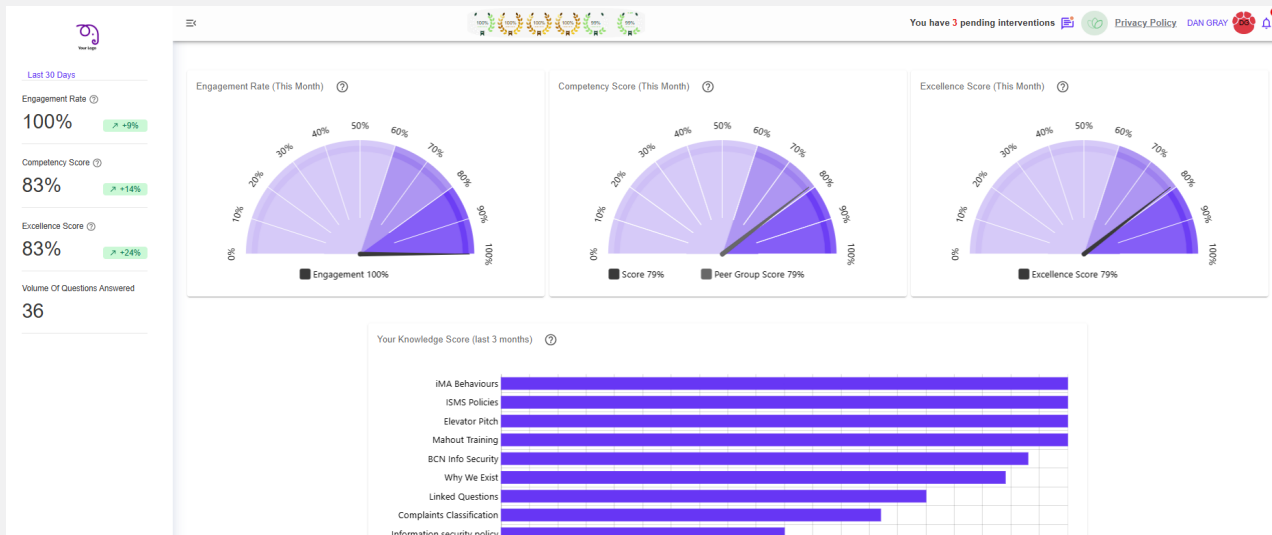
BUSINESS IMPROVEMENT

Clever Nelly helps your people reach and maintain competence. Questions focus mainly on the subjects an individual employee is struggling with most and presents the opportunity for greatest improvement, whilst gently reinforcing the content they have already learned.

REPORTING

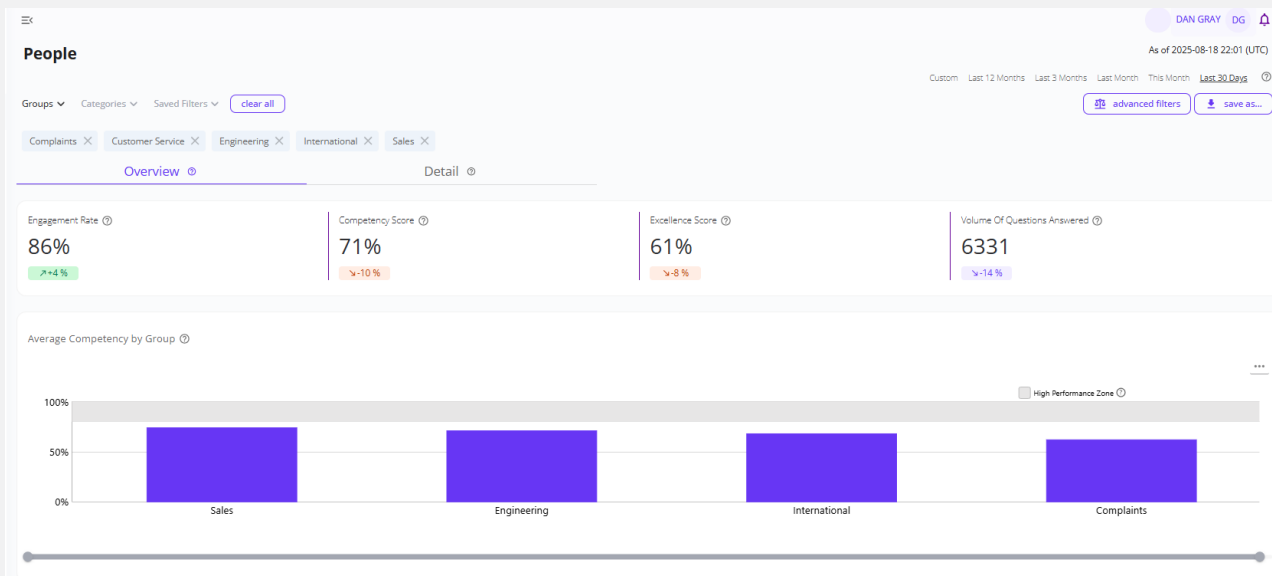
User Dashboard

Users are able to access their own engagement and competency scores via their user dashboard. This also provides an anonymous peer group comparison and a breakdown against different question categories.



Manager Dashboard

Team Leaders are able to access the engagement and competency data of their teams and can drill down into the data by individuals and question categories to provide targeted support. Senior managers are able to access all Clever Nelly data across multiple groups and teams to enable targeted interventions around under performing and high-risk areas.



CLEVER NELLY

FAQs

How easy is it to turn our content into questions?

There are two levels to the question creation element of getting Clever Nelly up and running. For theory-based questions, this requires very little effort from you. Simply send the training material to Elephants Don't Forget, we have a question authoring team on hand to analyse the material, understand what the training is looking to achieve, and to turn these into multiple choice knowledge retention questions.

Clever Nelly also utilises scenario-based questions to assess and understand the competence and judgement of each individual. As these scenarios need to be reflective of real-life situations your people will come up against, for this to be successful, we would require some input from a Subject Matter Expert your end. However, with an increase in effort comes a huge uptick in the value you will get back from your people being able to APPLY their retained knowledge. If post Go-Live you wish to take on the question writing yourself, you're more than welcome to do so, we run free question writing workshops to make you experts in the art of writing a good Clever Nelly question!

How do we get Clever Nelly implemented?

Implementing Clever Nelly is a very painless and smooth process. We have a structured way of achieving success, we project manage the process and have a very experienced implementation team internally that will look after you along the way. After a kick off call to get you acquainted with your dedicated account director and to agree the plan of action, we can get you live in as little as 28 days.

How is Engagement measured?

We measure engagement as the proportion of questions answered versus the number of questions that have been sent. Scores are based on the sent date.

How is competency measured?

We measure competency as the proportion of questions answered correctly, vs. the number of questions answered or timed out. Scores are based on the answer date.

Is there a combined measure of Engagement and Competency?

The Nelly Excellence Score is the multiple of engagement and competency, essentially giving a balanced view of effort and performance.

Competency x Engagement / 100 = Nelly Excellence

Scores below 50% are generally considered an issue. Anything above 64% (e.g. 80% engagement and 80% knowledge) is generally considered good.

What happens if users get a question wrong?

When users get a question wrong, they will be informed of the correct answer, and Nelly will then re-ask the question again within a 14-to-28-day period. This is outside short-term memory, but not outside of long-term memory, and the repetition of the question helps to embed the correct knowledge and build employee confidence.

What happens when users get a question correct?

When users answer a question correctly, Nelly acknowledges this and prevents the question being sent again for a period of time, approximately 4 to 6 months. Repetition of questions answered correctly is important to reduce the very real challenge of knowledge fade.

What reporting will managers have access to?

For the first couple of months, our support team will send the team manager an engagement report for any new area launch, this comprises of:

- ✔ Daily engagement reports for the first five days; this is to ensure that there are no technical issues, incorrect email addresses, etc.
- ✔ Weekly reports to cover the remainder of the first month; this is to get on top of non-engagers and identify where focus is needed.
- ✔ Monthly ongoing engagement reports.

What information do users have access to?

For the first six weeks, users see three charts outlining their overall engagement, competency, and excellence scores. Once Nelly has collected initial data, users will be able to assess their own strengths and weaknesses using all of the individual user reports, including knowledge score by subject.

What happens if users go on annual or long-term leave?

Nelly will automatically 'temporarily suspend' users if they do not answer any questions for five days or more. Answering a full day of questions will reactivate Nelly to send new questions or another attempt will be made after ten days. If Users go on long term leave, for example maternity or sick, they can be suspended in the system so they will not receive questions.

Why do you use a countdown timer?

- ✓ It reflects reality; users should be capable of answering the questions in a reasonable period of time as they would be expected to in real life with a customer or colleague.
- ✓ It adds to the intrinsic motivation of the learning experience – gives a sense of achievement.
- ✓ It prevents users from looking up answers or asking others to answer for them, skewing or contaminating their individual competency results.
- ✓ It prevents users thinking they will answer that later and then never doing so.
- ✓ It enables Nelly data to assess time to answer profiles giving an insight into questions or subjects that users find difficult or even where they show little interest as they know they don't know the answer.

Can the countdown timer be switched off?

This is possible but not recommended due to the reasons outlined above. Where questions might require more time, due to complexity, we would recommend increasing the timer rather than removing it completely. Accommodations can be made for individual users, according to their specific learning needs, where required.

Can people be included in more than one assessment?

Yes, but this has implications on the number of questions users receive per day. Where possible, we should limit this unless it's for an ad-hoc or short-term period.

What is a normal assessment?

A normal assessment is our recommended approach for any new launch and should be used whenever possible. A normal assessment is a main bank of questions that are asked at a rate of two questions per day for the first 45 days. After this time, Nelly's AI kicks in and changes the volume of questions sent to the user (between one and five) and also increases the proportion of questions in weak-scoring category areas.

What is a custom assessment?

A custom assessment should be used as an additional assessment to boost knowledge in a particular category or support a short-term requirement, e.g. a new process or product launch. This assessment doesn't use Artificial Intelligence and is only recommended for the reasons outlined.

