TRAINING PROVIDERS / EVALUATION PACK

Evaluate how the technology fits your delivery

A program and facilitator worksheet for combining your instructional expertise with product activities while defining delivery responsibilities and commercial scope.

Who to involve

Bring a program designer, a facilitator and the person responsible for client delivery and licensing.

Choose the product around the outcome

Product	Learning focus
CapitalODA - Options & Derivatives Analyzer	Option payoffs, hedging and derivatives workshops
CapitalFIA - Fixed Income Analyzer	Bond pricing and interest-rate risk workshops
CapitalPFA - Portfolio Analyzer	Portfolio construction and risk workshops
CapitalEQA - Equity Analyzer	Equity valuation and assumption review
CapitalBOS - Back Office Simulator	Operations, settlement and exception-handling programs

Facilitated trading and market experiences

For CapitalCMS - Capital Market Simulator, CapitalFITS - Fixed Income Trading Simulator, CapitalFTS - Forex Trading Simulator, or CapitalPMS - Portfolio Management Simulator, discuss availability, participant arrangements and facilitation separately.

Compare the full portfolio

TRY / OBSERVE / DISCUSS

Facilitate a payoff-versus-profit discussion

Use the fictional call example with a $100 strike and $6 premium per share. Ask learners to compare outcomes at $90, $100, $106 and $120, then explain why $103 still produces a loss. Suggested planning time: 25-35 minutes. This is expiry arithmetic, not a pre-expiry option valuation.

Open the public example and worked method

Run the evaluation

1. Choose a module in your existing program and define the added learner activity.

2. Rehearse the example with a facilitator and identify instructions, prerequisites and likely misconceptions.

3. Request a demonstration of the relevant full-product learner and instructor workflows.

4. Agree delivery ownership, client reuse rights and access periods in the written scope before selling a delivery.

Evidence to review

Instructional fit. The activity supports the module outcome and leaves enough time for explanation and debrief.

Facilitator readiness. The facilitator can explain assumptions, identify common errors and review available learner evidence.

Delivery operations. Confirm account setup, participant counts, repeat cohorts, technical support and who handles learner questions.

Commercial permissions. Confirm client reuse, delivery frequency, branding or customization requests and licensed access in writing.

Use fictional inputs. Suggested timing is a planning estimate, not a prescribed course duration. These website illustrations are separate from the full products.

DECISION / OPEN QUESTIONS / NEXT STEP

Prepare the next conversation

1. Which module and client audience should the product complement?

2. How many deliveries, clients, learners and facilitators are planned?

3. What orientation, rehearsal and learner support do facilitators need?

4. What reuse rights, access periods and customization requests must be explicitly agreed?

Evaluation record

Product and learning outcome

Evidence observed and gaps

Decision: proceed / resolve gaps / defer

Decision owner and next review

A product inquiry does not grant resale, white-label, multi-client reuse or customization rights. Your organization owns instructional delivery and assessment decisions; agree technology and support responsibilities for the selected product.

Access and commercial scope must be agreed for the selected product. This worksheet is not a license, compliance attestation or guarantee of availability.

Plan an evaluation conversation

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