

Axonified Employee

Greg D'Angelo,

Vice-President and Chief Administration Officer,
Fund Administration, John Hancock Investments



“I know the managers like Axonify because it gives them a better sense of their staff’s level of understanding. It helps them better manage their teams and better understand their strengths and weaknesses.”

Greg D'Angelo is a Vice-President and the CAO of fund administration at John Hancock Investments, a premier asset manager representing one of America's most trusted brands with more than \$140 billion in assets currently under management. We talked to Greg about how his team is achieving success with Axonify:

Q: How would you describe the role the fund administration plays at John Hancock?

A: We have seven groups that are focused on certain areas of the business but work collectively. We have a tax team, a valuation team, a compliance team, and each of the managers of those teams is responsible for training and development and for the policies and procedures for their teams.

Effectively, we are risk managers. We control risk and try to mitigate any risk. As a manager, I want to know that if I've got a policy or procedure in place, my teams are following it.

Q: How do you and your managers use Axonify?

A: We use Axonify for employee training, to help with employee engagement, and for continuous reinforcement of policies and procedures that the individuals in fund administration have within their teams. We have both general content and more specific content for each of the teams. There's general mutual fund knowledge that everyone should be aware of, and the managers would tell you that there are an additional fifteen, twenty, or thirty things that their team needs to know. Axonify is critical to getting their job done, and it's reinforcing those critical things people need to know.

Q: What are the risks if your people don't understand or comply with information or procedures?

A: The risks are financial, regulatory, and reputational. If we miss something or cause an error, there could be financial implications and there could also be long-lasting reputational damage.



Q: How has Axonify helped you personally?

A: I've used Axonify both for training and for managerial oversight. For training, it has helped me better understand the unique or specific content for some of the content areas that I'm not a specialist in. For managerial oversight, it provides the power of continuous training and learning. It reinforces the message and ensures it resonates with our team. It's not just about pressing a button. We are very analytical; we must consider a variety of things and look ahead to understand the downstream impact of our decisions. Axonify helps reinforce that.

Q. What are some of the other benefits you or your company have experienced by using Axonify?

A: The way our department is structured, team members learn on the job and, generally, most come in with experience. Quick bursts of knowledge are a lot more efficient and with Axonify, there's a robust knowledge base of policies and procedures, increased knowledge of job responsibilities, and a better understanding of the mutual fund environment.

Axonify is helping with engagement too, and that was one of our goals in implementing it. A lot of our team members log in and use the application from their mobile devices. Really, people are gravitating to it; people really like it.

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