

# Building Confident, Compliant Teams: Modernizing Onboarding with AI- Driven Content Creation in a Regulated Environment

How Mogo accelerated onboarding, ensured compliance, and improved workforce readiness with centralized learning and AI-driven content creation

The Mogo logo, consisting of the word "MOGO" in a bold, white, sans-serif font, centered within a black square background.

## Client Overview

Mogo is a Canadian financial technology company dedicated to helping people achieve financial freedom through smart, accessible digital tools. Its platform includes products such as personal lines of credit, self-directed investing, fully managed portfolios, and advanced financial research tools—each designed to empower members to take control of their financial health and build lasting wealth.

# The Challenge

As Mogo expanded its product offerings and operations, the need for highly trained, confident teams became mission-critical. Employees had to understand not only internal processes, but also complex financial products, compliance requirements, and customer experience standards. However, training was managed through SharePoint folders and PowerPoint decks, making it difficult to deliver a consistent, engaging, and measurable learning experience.

Content lived in multiple locations, updates were manual, and leaders lacked real-time insight into learner progress and readiness. As onboarding cohorts grew, new hires took longer to ramp, engagement varied by team, and identifying who needed additional support became increasingly difficult. What once worked for a smaller organization was no longer sustainable for a fast-growing fintech company operating in a regulated environment.



# The Turning Point

As Mogo continued to scale, these challenges began to impact both operational efficiency and employee experience. Training consistency became harder to maintain, compliance tracking required repeated manual follow-ups, and leadership lacked the visibility needed to ensure teams were truly ready before moving into live operations.

Mogo recognized that training needed to evolve from static information sharing into a structured, scalable learning system that could support growth, accountability, and performance. After evaluating several learning platforms, the team selected Tovuti for its ability to centralize training, simplify administration, and modernize content creation—without sacrificing flexibility or ease of use.

Tovuti's intuitive design, role-based learning paths, real-time reporting, and AI-powered content tools made it clear that the platform could support both Mogo's immediate training needs and its long-term growth strategy.

# Transformation through Tovuti

With Tovuti in place, Mogo transformed how training was delivered across the organization. The platform became the central hub for onboarding, operational training, and compliance enablement.



The team built structured, role-based learning paths covering compliance, systems, and customer experience—ensuring every learner received the same consistent, up-to-date training. Using Dizi AI, which was Tovuti’s 1st-gen AI course creator now called AI Content Authoring Tool, materials were quickly converted into interactive courses, and new content could be created or updated in minutes as processes evolved.

Automated assignments, certifications, and reminders replaced manual follow-ups, while real-time dashboards gave managers instant visibility into learner progress, performance, and readiness. Interactive elements such as quizzes, gamification, badges, and certifications increased engagement and reinforced accountability before learners advanced into operations.

Administrative tasks were streamlined, allowing the training team to focus on coaching, optimization, and continuous improvement.

## A Platform for the Future

Today, Tovuti supports Mogo as a learning enablement platform that grows alongside the business. Training is no longer fragmented or reactive—it is structured, measurable, and embedded into daily operations.

With centralized learning, real-time insights, and AI-assisted content creation, Mogo has built a culture of continuous learning that strengthens compliance, accelerates onboarding, and improves workforce confidence.

What began as a solution to operational training challenges has become a long-term foundation that supports Mogo’s mission to empower people, scale responsibly, and deliver consistent, high-quality experiences as the organization continues to grow.