

Online Training Supports Credit Union Growth

At **SUMMIT CREDIT UNION**, operating efficiently is a key strategy for ongoing success. The organization's growth challenged the learning and development department to find a training solution that would enhance the learning experience for all employees, while at the same time improving efficiency. CUNA's **CPD**Online, an online course and learning management system service, provided the answer.

■ THE CHALLENGES

- Increase the efficiency of the employee learning and development function while enhancing the learning experience.
- Create a uniform and scalable approach to training that would support credit union growth and expansion into new geographic markets.
- Implement an online learning system that would act as a "one-stop shop" for credit union employees.

■ THE SOLUTIONS

- Create an internally branded system that brings together information on all training programs, including web-based and instructor-led components.
- Migrate to web-based courses whenever possible, reducing employee time and travel costs from distant branches.
- Enable employees to direct their own learning and provide managers with a means to track their progress.

■ THE IMPACT

- The scope of the training available to employees has increased, while the efficiency of the learning and development department has improved.
- Savings in travel time and mileage expenses have amounted to thousands of dollars per year.
- The entire learning experience has been enhanced credit-union wide.



"CPDOnline has helped us to redefine learning at Summit. We've expanded beyond the classroom by providing our employees with quality, engaging web-based learning opportunities that have greatly increased our efficiency.

CPDOnline is not only cost-effective, it also provides another way for our employees to learn."

- Kim Sponem
President/CEO
Summit
Credit Union



Summit Credit Union, a \$1.5 billion credit union with more than 118,000 members, has always placed a high priority on employee development, particularly as it impacts the member experience. At the same time, the drive for efficiency has become more important as the organization continues to grow in size and number of branch locations.

Today, the credit union has 24 locations throughout Southern Wis. and as Summit Credit Union grew in size and geographic diversity they had to find new ways to deliver learning more efficiently.

In order to achieve new efficiencies, the credit union decided to implement an online learning system. The ideal system would enable them to offer web based courses, including those built in to the system and others developed in-house at Summit Credit Union. They also wanted a system that would allow for online handling of administrative tasks associated with both web-based and instructor-led courses, such as registration, pre-work assignments, transcript management and course tracking for each individual learner.

The quality of the web-based courses that were part of the system was also critically important to Summit Credit Union. After a thorough evaluation of the options, the credit union chose **CPD Online**, the web-based training service from CUNA.

Online courses must be up-to-date and reflect credit union ideals

"There were a lot of features we were looking for in an online learning system," said Kimberly Frederickson, AVP of Learning and Development. "One aspect that was really important to us was the quality of the courses that came with the system. The CUNA courses are all very current, very relevant and accurate.

"There are many CUNA courses within the system that we use

regularly across a full range of topics," Frederickson added. "The courses that we develop internally concern topics that are specific to Summit Credit Union, such as our new employee orientation and courses related to our systems and culture. We rely on the CUNA courses for regulatory training and any other content that is not specific to Summit."

Frederickson also appreciates the fact that the courses accessible through **CPD Online** are credit union-specific, while other courses Summit Credit Union has used in the past contained "bank language."

To create a system that is an integral part of the credit union, Summit Credit Union worked with CUNA to brand the system internally as Summit Center for Professional Development (SCPD). Anyone who logs onto the system sees the SCPD logo, and the learning and development staff encourages all of their associates to refer to the system as "Summit Center for Professional Development." Once users get deeper into the system, they are still able to see that certain course content has been provided by CUNA.

"To see the CUNA name on courses is a plus in and of itself," says Jon Zulawski, E-learning Application Specialist. "It's reassuring, like a stamp of quality. We work with CUNA for so many products and services that our employees are very familiar with the CUNA name."

System's online features save time and money

Frederickson reports that the new system has streamlined the time that used to be spent on administrative tasks.



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Prior to launching **CPD**Online, learning and development staff members were responsible for pulling transcripts when managers requested them for their employees. During review periods alone, Frederickson and her staff would spend 20 to 40 hours per week responding to requests from managers and resolving transcript disputes. Now, all of this information is accessible online and users can manage and track their own learning or that of their direct reports.

Cost savings are also achieved because travel expenses associated with employee training have been reduced. For example, the new employee curriculum is housed entirely within **CPD**Online. Prior to **CPD**Online, new employees had to come in for four days of classroom training, incurring mileage and hotel expenses. Now the classroom portion has been reduced to two days, with the rest of the new employee curriculum being offered online. Other course content has migrated online in its entirety, reducing the need for classroom instruction.

"We are finding that the savings in time and mileage expenses by delivering content in will have almost paid for the system," Frederickson observed. "The great news is that the value is so obvious that it makes providing ROI for the system easy."

Classroom training still has a place

Both Frederickson and Zulawski are quick to point out that not all training content is best delivered online. "If a course is best delivered in an instructor-led format, we want to keep it that way," Frederickson said. "Before we migrate content to a web-based format, we ask ourselves: 'Does this require face-to-face interaction or is something where employees can conveniently participate via a web-based format through **CPD**Online.' Ultimately, the priority is a positive learning experience for the employee."

Summit Credit Union's learning and development program taps the

broad selection of web-based courses on **CPD**Online, other web-based courses they develop in-house, and instructor-led courses or components. **CPD**Online is able to integrate them all into a centralized learning management system for tracking and record-keeping, with users entering many updates on their own.

Trainers now bring added value to the credit union

Using **CPD**Online, learning and development staff members can use any major online course development tool that is available to create new content; **CPD**Online supports them all. Courses can be uploaded and updated directly by staff. The increased use of web-based courses and corresponding reduction in instruction time has shifted the emphasis of the learning and development staff more toward instructional design and development rather than simply delivering classroom training.

"What's exciting for us is that our trainers have more time to focus on developing courses that can have a direct impact on credit union financials," Zulawski said. "Much of the time we would have spent in the classroom has shifted so that we can impact the organization in a more beneficial way."

"We've actually revised our job descriptions to reflect the expectation that trainers will demonstrate some expertise in web-based course development," Frederickson added. "There's an added dimension to their skill set now that they design and deliver curriculum in both web-based and instructor led formats. We joke that we've made our training staff much more marketable."

Looking ahead, Frederickson and her colleagues anticipate rolling out additional features in **CPD**Online, such as the ability to assess competencies and manage career pathing. For now, implementing **CPD**Online has enabled Summit Credit Union to enhance the learning experience and bring new efficiency

to the learning and development function. "We want our department to be in a position where we're ahead of the curve," Frederickson said. "With **CPD**Online, we're well poised to absorb additional growth as it happens."



*"As we've looked for opportunities to expand the scope and flexibility of learning options available to employees and to deliver and track these options in an efficient manner, **CPD**Online has been an invaluable contributor to our success."*

- Tracy Nelson
VP of Learning & Organizational Development
Summit Credit Union



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CASE STUDY

ONLINE TRAINING SUPPORTS CREDIT UNION GROWTH

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