



Case Study: MAX Credit Union Cutting Costs and Capturing Culture

Challenge: Enabling Expansion through Efficiency

MAX Credit Union has grown rapidly in the last ten years, adding four new branches with a fifth on the way, and now serves seventeen counties throughout central and eastern Alabama. As MAX expands, the distance of its branches and the diverse training needs of its growing staff continues to increase. MAX has been relying on BAI Learning Manager to administer and monitor all of its compliance training for over seven years. Due to MAX's recent accelerated growth Bethany Burger, MAX's Professional Development Specialist, has needed to find additional ways to utilize the BAI Learning Manager to provide her growing, dispersed staff with consistent relevant training and reduce unnecessary travel.



Institution Type:
Credit Union



Customer Since:
2007



Location:
Alabama



Growth:
Four New Branches
with a fifth on the way

Time Saving Automation

According to Burger, "one of the greatest benefits of utilizing BAI compliance training is the amount of time the BAI Learning Manager's automated assignment, tracking, and reporting saves our team as well as managers and supervisors." Burger can use the BAI Learning Manager's numerous automated features to assign employees required courses by job title rather than having to manually enter individuals. All training attendance and results, including instructor-led classes, are tracked in the system that provides easy to access compliance training documentation for auditors. Burger can easily pull reports showing completion status of required courses for



"Being able to use and trust BAI Learning Manager to cover all of our compliance needs has allowed me to diversify my role and concentrate on developing the teaching aspects of our training program."

Bethany Burger,
Professional Development Specialist
MAX Credit Union

Continued



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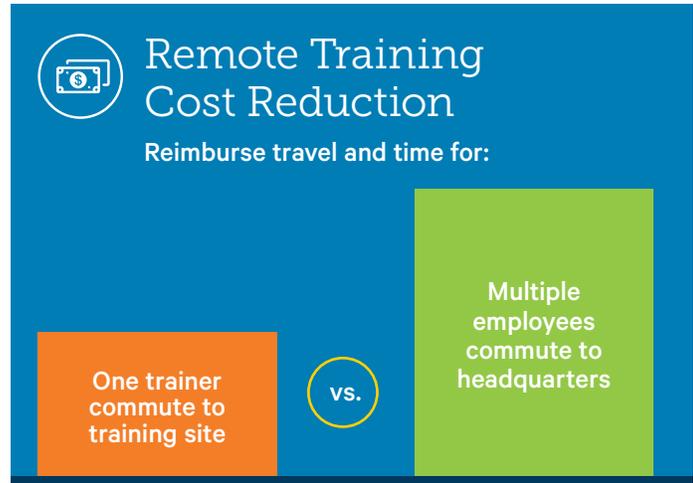
Cutting Costs and Capturing Culture

each employee. She can review transcripts and scores to determine whether staff have completed prerequisite courses and achieved the results necessary to move to the next level. Burger can also schedule email reminders about upcoming training deadlines, perhaps her favorite aspect of the system. “I love many aspects of the BAI Learning Manager, but especially that it allows me to schedule quarterly reminders in advance! I used to have to send reminders manually. Now I can save a ton of time by scheduling all of my reminders for the year.”

The ability to auto schedule and monitor training is particularly helpful to managers in onboarding frontline employees ranging from tellers and telephone customer service to lenders. With the BAI Learning Manager MAX can ensure that all of the new employees are scheduled for required trainings, in the appropriate order, and instructor-led course slots are reserved as appropriate. Managers are provided information about employees’ anticipated time frame for completion and do not have to worry about any other aspect of the training. MAX’s managers are also able to review full training transcripts so they can monitor the individual training and development of all of their employees.

Spanning the Distance: Reducing Travel, Costs, and Time

MAX relies on instructor-led courses for all of its training but particularly for training entry-level employees, where it is critical they learn and understand not only the guidelines but MAX’s culture and service standards. Previously, MAX would offer instructor-led courses several times a year at its headquarters, and all employees would be expected to commute for the training. As MAX’s branches have become more spread out some employees face an hour commute each way. This is time consuming and inconvenient for commuting employees and costly for MAX, which reimburses mileage expenses. The BAI Learning Manager has allowed MAX to conduct remote and “clustered” trainings. When they have several employees in one area MAX will schedule a training at a local branch and send one trainer to that location. The BAI Learning Manager can direct employees to appropriate local training sessions. Being able to provide remote trainings has made life easier on employees and greatly reduced



costs associated with training as MAX only has to reimburse one trainer’s mileage, rather than eight to twelve employees.

Customizing Content to Capture Culture

As MAX continues to expand, one of their priorities is to ensure all employees share the same in-depth understanding of their products and culture. It is critical to MAX that every employee not only completes compliance requirements but understand company policies and products. While MAX relies heavily on BAI’s extensive library of compliance courses, they retain the freedom to design their own courses imparting credit union culture and products. The BAI Learning Manager’s I-DESIGN® tool allows MAX to create custom courses, design assessment tests, and track whether employees have reviewed policies and procedures. MAX uploads critical documents in PowerPoint or text form with questions at the end to verify the employee has read and understood the material. In addition, employees interested in advancement are assigned assessments that test their knowledge of specific products and technical aspects, as one of the steps towards completing training for the next-level position.

BAI has helped MAX expand the breadth and depth of its training program by not only responding to the Credit Union’s training needs but offering suggestions and enhancements. Burger works closely with her BAI Relationship Manager, Rebecca Andrews, to continue to develop and improve MAX’s training program. “Rebecca is great at asking probing questions. She not only helps us maximize the value we get from BAI, but often helps us understand enhancements or features we need, but don’t even realize we need.” BAI has been critical in helping MAX adapt their training program to their growing staff and needs.

