



# Case Study: PyraMax Bank Catered Care and Convenience

## Challenge: Striving for System Strength and Simplicity

As a small community bank serving southeastern Wisconsin for over 120 years, PyraMax was looking for a compliance training program that would provide the same level of high quality personalized service it provides customers. When PyraMax's contract with its existing provider was about to expire Cynthia McIntosh, PyraMax's Training Director, began her due diligence researching other options to confirm they had the best system for their needs. While PyraMax's system at the time satisfied their compliance training requirements, PyraMax wanted to be able to centralize all training tracking and reporting in one easy-to-use, effective, efficient, and affordable system.

 Institution Type:  
**Bank**

 Customer Since:  
**2012**

 Location:  
**Wisconsin**

 History:  
**120 Years**

 Branches:  
**8**

## Choosing BAI: Product, Pricing, People

PyraMax researched and compared several different companies prior to choosing to switch from its previous provider to BAI. McIntosh was amazed from the start by BAI's level of personal, attentive service, the simplicity of the system, customizability of reports, and depth of the software. With a small staff with varying degrees of technical knowledge, McIntosh was particularly drawn to the user friendliness of the BAI Learning Manager. In addition, PyraMax knew it could trust



"From the initial exploratory phase through my three years with BAI I have been impressed by how they continue to go the extra mile to answer all my questions and accommodate PyraMax's needs."

Cynthia McIntosh,  
Training Director  
PyraMax Bank

Continued

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the quality and accuracy of BAI's compliance courses based on reputation and previous experience using BAI's training materials.

However, PyraMax wanted to make sure if it chose to switch, the value of the new learning manager system would be worth the potential challenges and stress typically associated with switching training providers. McIntosh did extensive research comparing price point, software, customer service, and even billing structure. According to McIntosh, "In the end, it came down to who stands out of the crowd in every critical aspect, and the decision to switch to BAI was clear."

### Smooth Transitions

PyraMax's switch to BAI was smooth and relatively stress-free due to continuous support and guidance from BAI's team. McIntosh found the same responsiveness and personal attention that had initially drawn her to BAI not only continued but became even more comprehensive and attentive once PyraMax became a customer. BAI's team worked with McIntosh to help her set up learning plans, learn the system, and transition all of her training and reporting. Three years later McIntosh still appreciates the onboarding process; where she was guided through all of her technical questions until she had the knowledge she needed to successfully utilize every aspect of the system. "BAI's entire team was always there to help. Throughout the transition I knew I could always call and rely on them to field any questions."

BAI has not only helped PyraMax easily and efficiently administer compliance training but has become the source of all the knowledge training and career advancement knowledge for PyraMax's staff. PyraMax has centralized all training and reporting in the BAI Learning Manager and is even beginning to use it to track outside training. McIntosh has been able to utilize BAI's Professional Skills courses as a great supplement to PyraMax's career pathing allowing her to provide employees not only with a map of the knowledge and skills needed for advancement but tools to achieve them.

PyraMax has been a BAI customer for the last three years and just renewed its contract. For McIntosh, this time when it came time to renew she didn't even think to look elsewhere; "BAI has not only met but continues to exceed our expectations."



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