



CU*ANSWERS

Client Services & Education

Client Education Services

CU*Answers recognizes the versatility within learning styles, and we are proud to offer different venues to accommodate the educational preferences of our clients. We continue to provide five full weeks of classes in a combination of classroom training and web conferences. Other university classes are integrated into our education schedule throughout the year. Other supplemental education is provided during the year in the form of focus groups, special events, and workshops. Some are scheduled in advance as part of CU*Answers University and are found listed in the education catalog. Classes in these venues cover industry-specific topics, regulation and compliance, marketing channels, collections, and your lending factory, just to name a few.

Course Venues

Web Conferences

Web conferences have become a primary training venue. Whether out of state or around the block, CU*Answers clients can attend any class we offer via web conference if they have access to the Internet and a phone.

CU*Answers University classes are only one segment of our training opportunities. Web conferences are heavily used for single-session training, coaching, product demonstrations, and for sharing information across our network, which now spans the contiguous United States.

Classroom Training

Classroom training was originally developed simply to educate our clients using CU*BASE software, but over the years it has evolved into much more. These sessions are designed to encourage client interaction, gather ideas for new software development, and give our clients an opportunity to discuss the industry and best practices with their peers.

Workshops

For the student who learns best by doing, hands-on workshops can enhance the learning experience and turn theory into knowledge. We encourage you to request training in a workshop environment to take full advantage of classes offered through CU*Answers University. Email education@cuanswers.com to request a workshop.

Individual Training

Training specially tailored to your credit union is still in style. There are times when your team needs training concentrated on your unique education needs and special processes. When this is true, we encourage on-site training based on a timeframe that's convenient for you. Email education@cuanswers.com to schedule individualized training.



Focus Groups

Collaboration feeds innovation and as a CUSO, CU*Answers thrives when clients are involved in the development of our products and services. Focus Groups bring together credit union professionals from various disciplines: lending, collections, marketing, web design, and more.

Participate in a focus group! Your contributions are valuable to the entire process, which starts with sharing ideas and discussing industry needs to create the tools you use today! *(Invitations will be emailed separately to your credit union as focus groups are scheduled throughout the year.)*

Regional Training Events

Combining learning with networking, Regional Training Events offer a unique opportunity for CU*Answers clients. As the name implies, the location of these events is dependent on the geographical area of the country, and the events are intended to accommodate on-site training without the burden of travel to Grand Rapids. Topics are most often selected for their timely and educational value, but are also based on request.

OnDemand - CU*Answers

The CU*Answers OnDemand site is a growing library of CU*BASE training, special events, and multi-media presentations provided at no charge. To access the OnDemand site, go to ondemand.cuanswers.com or start at cuanswers.com, click I am a Client, then Education, then OnDemand Courses. No registration or special login is required. Over 100 items are posted on the site, ranging from CU*BASE training to informative regulatory-compliance reviews.

Education Express

Launched as adjunct training to raise awareness of significant topics in the industry, the monthly complimentary Education Express has proven to be a success. So get ready for more top-of-mind topics to be presented in 20- to 30-minute segments each month to keep you informed with "what you need to know." These short sessions will be concise and to the point, focused on upcoming events, software upgrades, hot topics, and much more! Watch for the Education Report Newsletter, where the date and time is announced.

Subscribe to the **Education Report Newsletter** from a link on our website. Here's how: Go to cuanswers.com > I am a Client > Docs & Information > Newsletters.

Bedrock Community Credit Union

Welcome to Bedrock Community Credit Union, where your teams can practice using CU*BASE features in an environment that emulates a real credit union. The operating software uses a library that is set up similar to an authentic credit union to support realistic training for new and existing employees.

Exercises for Success Workbooks

Designed for use with Bedrock Community Credit Union, this workbook series provides additional practice for performing common CU*BASE functions and is a great way to reinforce CU*BASE training among new staff. For more information on our Exercises for Success workbooks, visit

http://cuanswers.com/client_education_exercises.php.

CU*Answers Online University

We are excited to present a new online campus this year. CU Training Inc. was our first choice of vendors offering online campuses as they not only offer the same type of soft-skills content that we've always enjoyed, but they also offer a learning-management system with more credit union-specific controls. You'll find fresh, new content developed by industry experts, plus you'll be able to track your staff's progress, award them certificates of completion, and design individual development plans. All courses are available to any employee of your credit union from any CU*BASE terminal.



Your Own Online University

Want even more training for your staff? If your staff gravitates toward online learning, you might benefit from an expanded campus tailored to meet your credit union's needs. Our partnership with CU Training Inc. means that you can purchase your own campus that includes:

- *CU*BASE courses as offered in the CU*Answers online campus*
- *The full course catalog that includes additional credit union-specific courses*
- *Product information customized for your own staff*
- *Comprehensive learning management system (LMS) with tools to let you track individual student activity*
- *Individual development plans that allow supervisors to define what their own employees need to learn*
- *Testing and certification features including management-reporting and analysis tools*

To learn more, email education@cuanswers.com.

Conversion Training and Support Services

The Client Service and Education team participates heavily in the process of converting a new client to our CU*BASE suite of products. We also work, with the new client throughout the planning process and provide continued support after the conversion, and throughout the relationship with the client.

What we do:

- *Work with the Sales Team to determine the amount of training and support a new client will need both pre and post conversion*
- *Provide pre-conversion training at the client site in a workshop environment and via web conference*
- *Provide post conversion training and support at the client site*
- *Provide follow-up contacts for each new client for the first six months*
- *Provide continued phone support throughout the relationship with the client*
- *Provide on-going training throughout the relationship with the client*

As you can see, we become an extension of the client's team!

It is our belief that if we are to develop and succeed, we must exceed our clients' expectations.

Client Support Services

The Client Service and Education team specializes in a number of areas. From the client perspective, we are the frontline for software questions, education, and to some extent light consulting. It starts with daily phone and AnswerBook support and continues with conversion training and support as well as the completion of many special projects throughout each month. In addition, we add value for our internal teams through daily support and special project requests. We consider our partners part of our team as well, supporting them and their clients as we would our internal teams. The client service experience that we give is very important to our team and our organization, so we set and monitor standards for client interactions, and training.

Frontline for software questions

Client Education

Event coordination

Internal education and support

Light consulting

Special project requests

Research

Product implementation

Support for our internal teams

Support for our partners (CU*NorthWest and CU*South) and their clients

Professional Services

- *Quarterly user audits*
- *Monthly statement work*
- *Dividend/variable rate code monitoring*
- *Building custom reports*
- *Third-party file creation*
- *Dividend regeneration*
- *Configuring misc., member account forms*
- *User ID resets*
- *Designing training plans*
- *Balancing requests*

Client Service Promise

The CU*Answers Client Service and Education team is available to assist through numerous electronic delivery channels, which allow you to focus on your team and obtain assistance on your timeline. Staying in contact with our team when a phone call is not possible has never been easier. One of the more popular options is AnswerBook, which is a product that provides over 2000 frequently asked questions, as well as the ability to create a profile and submit questions in a secure authenticated environment to protect sensitive member data. The team is also available 24 hours a day, 7 days a week via phone support, which provides you with an answer immediately. This allows us to give you the attention you need for issues at hand.

Team Mission

The mission of the Client Service and Education team is to give the assistance and training our clients and staff need to be successful. Our major area of focus is providing day-to-day support and development of our Staff and Clients through Education.

Your success is our success.

Discover More!

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CUANSWERS.COM

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