

## 11

# Documentation: Tricks of the Trade

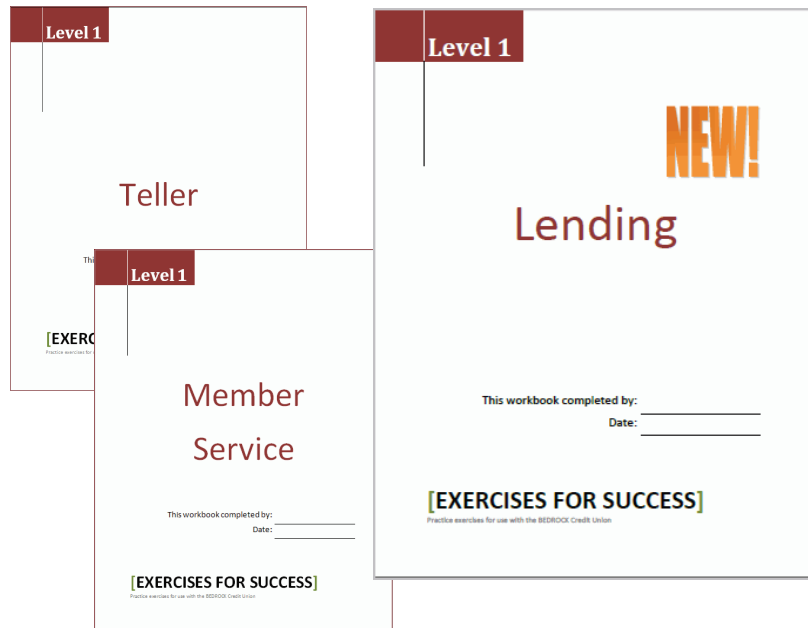
## Tools for New Employees

### Q1: Where can we find practice exercises for our new employees?

Do you have a new employee or are you taking on new responsibilities at your credit union?

*Exercises for Success* provides helpful exercises to practice teller, member service, and now (NEW!) lending tasks. These workbooks are designed to be used with Bedrock Credit Union after the CU\*Answers University courses for teller, member service, and lending are completed.

Find these workbooks at [http://www.cuanswers.com/client\\_education\\_exercises.php](http://www.cuanswers.com/client_education_exercises.php)



*Check out the Exercises for Success series. Each lesson provides scenarios for practice and review to ensure that the procedures are mastered.*

### Q2: What should I use to start training my new staff?

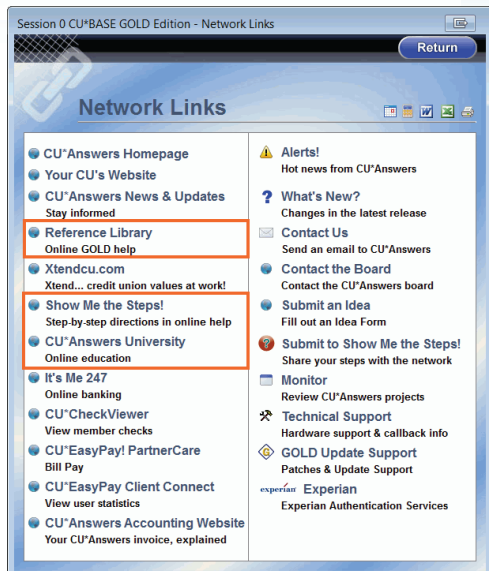
When we begin training new employees at CU\*Answers, the first thing we point them to are the online CU\*Answers university classes. These courses walk new employees through many common CU\*BASE tasks for a wide range of job descriptions.

With so many different courses to choose from, including over 25 just on CU\*BASE, we have something for everyone! Each CU\*BASE online course includes step-by-step videos including “Let Me Try” videos, which simulate the experience of using CU\*BASE.

*Exercises for Success* are built directly on the skills taught in several popular courses. After new employees take the courses, they can use *Exercises for Success* to reinforce what they have learned.

Find the online courses at [http://www.cuanswers.com/client\\_online\\_courses.php#content](http://www.cuanswers.com/client_online_courses.php#content)

*Your new employees can access the CU\*Answers University courses, Show Me the Steps, and CU\*BASE online help—all from the Network Links screen in CU\*BASE.*

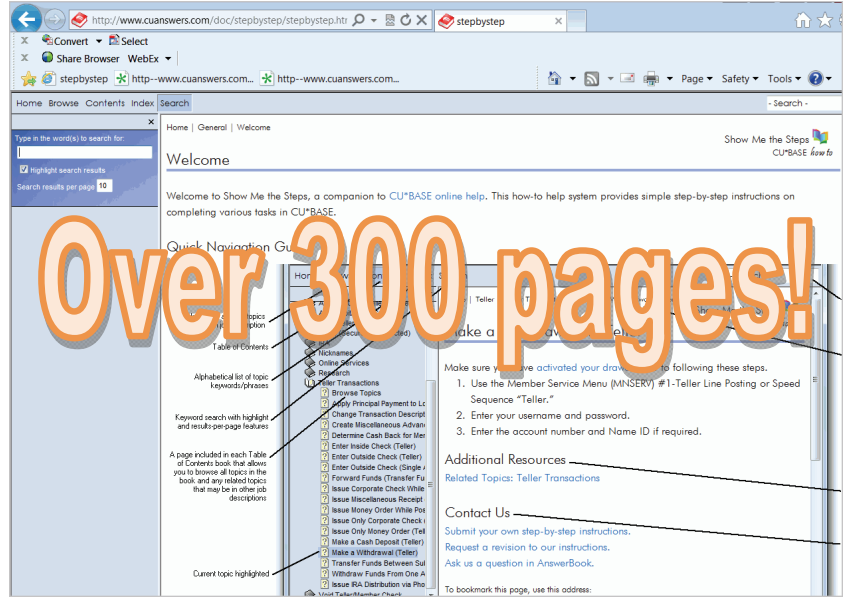


### Q3: Which resource can my staff use to become experts in CU\*BASE?

Check out the new look of Show Me the Steps and its new and improved search feature. Now Show Me the Steps has over 300 pages of step-by-step directions!

Xtend participated in a contest for Show Me the Steps and submitted over 100 new submissions. Now you can learn from these step-by-step directions submitted by our experts in SRS Bookkeeping, Audit Link, and the Xtend Call Center.

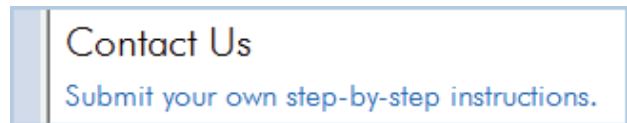
Take advantage of their hard work to become an expert yourself!



### Q4: How can I create free online training materials that are constantly reviewed and updated?

Creating training materials for new employees can take time and can be a hassle to keep updated. Why not post your own step-by-step directions in Show Me the Steps? This way you can also participate in a collaborative resource that is constantly reviewed and updated.

It is easy to submit your entries! Just click “Submit your own step-by-step instructions.” Find this at the bottom of every page in Show Me the Steps.



### Q5: How can I write a more effective email?

Every month, the Client Services/Education department offers a *free* Education Express class. Generally, this class covers a CU\*BASE topic. This time, however, a member of our Writing Team will lead “Writing an Effective Email.” This class is designed for writers of all levels. Even good writers will pick up something new!

The next Education Express class is offered on September 19<sup>th</sup> from 2:00 PM–2:30 PM ET. Register for this class online at <http://www.cuanswers.com/education/syllabi/?course=EX.2012>



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