

Conversations on*

Education

A CU*Answers Collaboration Group



CU*ANSWERS
Client Services & Education

MEET OUR CSR TEAM



LAURA

VP of Client Services and
Education



KASEY

Manager of Client Services



LANI

Team Lead of Education

THE LEARNING CENTER TEAM



AMANDA

Manager, Client Experience



JENNETTE

Client Experience Specialist

INTRODUCTION

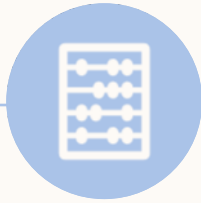
During our first session, we'll cover Designing an Education Plan and Calendar. Included will be tips from the Education Team on how we go about creating our annual Education Catalog, but **we'd also like to hear from YOU** about how your training teams set up a calendar and plan for training new employees, onboarding team members who move to other positions, or cross-training to share knowledge among team members.



PRIMARY GOAL

Discuss Techniques for Training New Staff

CU*ANSWERS RESOURCES



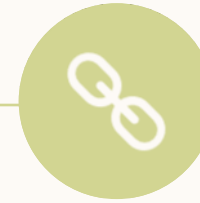
SELF-PACED LEARNING

- Online Courses & Exams
- Bedrock Community CU
- Custom Training Edition
- Exercise for Success
- and more...



WEBINARS

- Teller/Member Service Days
- University Weeks
- Education Express
- Learning Café
- and more...



IN-PERSON EVENTS

- CEO Strategies
- Compliance Training
- AI Weeks
- Leadership Week
- and more...

ONLINE CAMPUS

We offer free on-demand courses that you can take any time anywhere. Options for the CU*Answers University Online Campus are listed below:

- Free Campus with Administrator Access
- Full Campus
- Expanded Campus


SIMULATED TRAINING



**A Simulated Training Environment:
Bedrock CCU**

Bedrock Community Credit Union is a shared training resource that lets credit union employees practice using CU*BASE features, without risk to live credit union data. Available to all online credit unions free of charge, Bedrock can be accessed by logging in via special CU*BASE user profiles.

\$400 monthly value* FREE to all online clients!



**A Customized Training Edition:
CU*BASE CTE**

The CU*BASE Custom Training Edition (CTE) is a new alternative to the shared simulated training environment (Bedrock Community CU) currently used by all CU*Answers online clients. For a fee, you can have a copy of your own membership data set up as a training environment, available only to your credit union's employees.

Just \$250/month after a \$2,000 one-time setup fee!

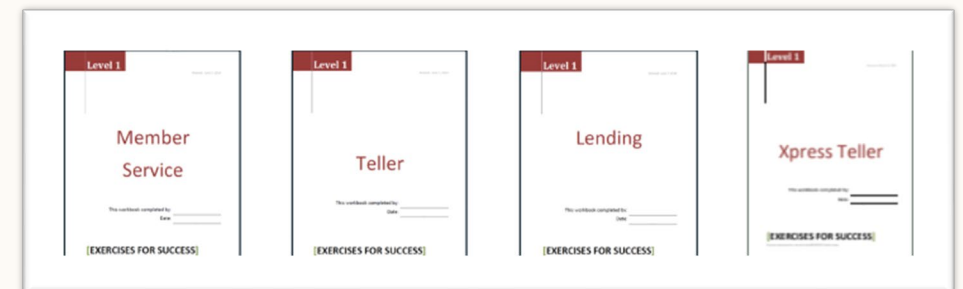
- With the *Bedrock Community Credit Union* simulated training environment, CU*BASE users can practice using the software without the worry of affecting real member data. Bedrock is set up just like a real credit union, but without links to outside vendors. This shared training resource is available to all online credit unions **free of charge**.
- Unlike Bedrock Community Credit Union, which is used by all CU*Answers online clients, CU*BASE *Custom Training Edition (CTE)* is a training environment used exclusively by the subscribing credit union. CU*BASE CTE is customized to mirror the subscribing credit union's live environment. **For a one-time setup fee plus a monthly maintenance fee**, clients can have a copy of their own membership data set up as a training environment, available only to their credit union employees.

EXERCISES FOR SUCCESS

Designed for use with CU*BASE simulated training environments, this workbook series offers new CU*BASE users practical experience with common CU*BASE tasks. The series comprises three workbooks that reinforce key areas of credit union operations: member service, teller processing, and lending. Each workbook includes helpful instructions that guide learners in selecting appropriate accounts for use while practicing the activities covered in the booklet. Activities are based on common member scenarios and are followed by a knowledge check that learners can use to gauge their progress.

The workbooks can be downloaded as PDF booklets here:

- [Member Service Exercises](#)
- [Standard Teller Exercises](#)
- [Xpress Teller Exercises](#)
- [Lending Exercises](#)



HOW DO I COMPLETE A REQUEST TO SIGN MY EMPLOYEES UP FOR CLIENT NEWS AND ALERT EMAILS?

If you would like to submit a request for one or more of your employees to begin receiving Client News and Alert emails, use the button below to visit the CU*Answers online store. Submitting a request to have your employees added to our distribution list is completely free. Typically, new email addresses are added to the CU*Answers distribution list within 1 to 2 business days.

[Click Here to Get Started](#)

SHOW & TELL

For those comfortable with sharing:

- What does the “*First Day*” on the job look like at your Credit Union?
- Does your New Employee Onboarding Plan include CU*Answers Online Courses/Exams from TLC? If so, which ones?
- Have you tried incorporating our *Exercise for Success* Guides?
- What techniques do you find work best for onboarding a new team member?
- What challenges do you have with your current plan(s)?

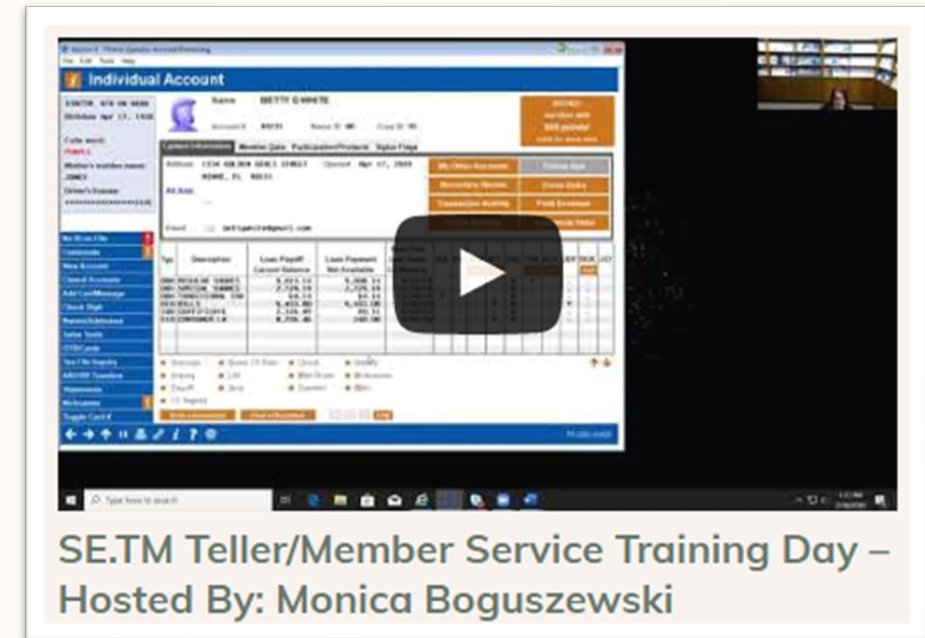
TELLER/MEMBER SERVICE TRAINING DAYS

TELLER TRAINING

- 04/17/2023 from 1:00 PM – 5:00 PM ET
- 06/13/2023 from 1:00 PM – 5:00 PM ET
- 08/23/2023 from 1:00 PM – 5:00 PM ET
- 10/12/2023 from 1:00 PM – 5:00 PM ET
- 12/21/2023 from 1:00 PM – 5:00 PM ET

MEMBER SERVICE TRAINING

- 05/10/2023 from 1:00 PM – 4:30 PM ET
- 07/11/2023 from 1:00 PM – 4:30 PM ET
- 09/21/2023 from 1:00 PM – 4:30 PM ET
- 11/14/2023 from 1:00 PM – 4:30 PM ET



THANK YOU

Don't forget to check out our [2023 Education Catalog](#) for upcoming opportunities at **NO COST** to the Credit Union.