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

• 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.
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.