

Client Services & Education

Behind every successful organization are the people dedicated to its success. Our team is varied and fills many roles; championing and producing the Education Catalog, aiding clients with software and service questions, research, special projects, conversion support, and daily education keep our team busy with a little bit of everything! We can't wait to help your credit union thrive.

Professional Services:

For details, visit the CU*Answers Client Services and Education Store:
store.cuanswers.com/client-services-and-education

Education Opportunities

CU*Answers understands that not every training approach will work best for every credit union; therefore, we pride ourselves in offering a variety of training methods that accommodate the preferences of our clients from coast to coast! Our team not only provides a bevy of training styles to best fit your needs, we provide all basic training free of charge (the only exception is customized training, which incurs a nominal fee). The Client Services and Education Team encourages you to explore our various training methods:

Education Catalog:

Browse the CU*Answers Client Services and Education Catalog:
www.cuanswers.com/resources/edu/courses

A Custom Training Edition (CTE)

The CTE gives your team a safe place to practice using CU*BASE tools, learn new skills, and experiment with new features without potential harm to your live member data. The CTE is files; of which includes both the product configurations and member accounts. This will make your customized training environment mimic what you see in your day-to-day environment.

CU*BASE CTE

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Support Hours:

Monday - Friday

7:30 AM ET to 12:00 AM ET

Did you know?** Since the start of 2019, The Client Services and Education Team extended their services hours and now takes calls between the hours of 7:30 AM ET and midnight ET! **1-800-327-3478

**The Team
is on-call
and available
24/7 365**

Team Mission

*The mission of the Client Services and Education Team is to provide assistance and training to help guide our clients and staff to success. Our main area of focus is providing staff and clients day-to-day support, and continued development through education.
Your success is our success!*

Support Services

- Front-line for software questions
- Client Education
- Event Coordination
- Internal education and support
- Best practices
- Special project requests
- Research
- Product implementation
- Support for our internal teams
- Support for our partners CU*NorthWest and CU*South, along with their clients
- Pre-Conversion Training
- Post Conversion Support
- Transition Group Meetings