JPMorgan

JP Morgan Chase & Co.

TOOLBOOK® CUSTOMER SUCCESS

▶ THE COMPANY

As a major line of business within the global financial services company, JP Morgan Chase & Co., JP Morgan Chase Card Services is a leading provider of credit card products and services in the USA and Canada. The organization has 22,000 employees in over 20 locations, including three international facilities.

Through its Performance Improvement Team, Chase Card Services has made a significant financial investment in providing both operations and compliance training to its 22,000 employees. A major percentage of training activity is in the computer-based training (CBT) format.

▶ THE CHALLENGE

The Performance Improvement Team is responsible for training Card Services' customer-facing employees, so they can remain up-to-date on in-house systems, partner programs, and policies related to customer service. When the Card Services organization began to experience rapid growth across multiple sites, however, the Performance Improvement Team quickly realized it would need a new content authoring solution in order to continue reaching its training objectives.

The Team wanted a comprehensive tool that would help meet all its authoring needs. Another top priority was to select a solution that would reduce overall training time, while also enhancing employee knowledge to keep pace with changing needs. To accommodate these challenges, the authoring solution would need to integrate, if possible, with the company's Learning Management System (LMS) from SumTotal. Furthermore, because many employees serviced customers over the telephone, the Team wanted a solution that would promote efficient utilization of employee time.

And finally, the organization needed a solution that would be technically compatible with a wide variety of desktops across different departments at multiple sites.

▶ THE SOLUTION

Ultimately, Card Services' Performance Improvement Team chose the ToolBook authoring software from SumTotal to reach its growing audience. ToolBook enables a team of subject matter experts to create media-rich online courses that incorporate text, graphics, audio, simulations, and extended assessments. While past experimental use of the software gave the company some insight into the solution's capabilities, its current advanced features have made ToolBook an integral training tool in daily operations. Now training courses can be easily created and deployed to thousands of customer-service employees at their desktops. Moreover, because ToolBook offers complete integration with the company's LMS, course completion can also be easily tracked.

"Integration with the SumTotal LMS is a very important feature of ToolBook for Chase Card Services," says William Loucks, e-learning technology manager at Chase Card Services. "Course developers can now be assured that any courses created and published in ToolBook will be fully compatible with the LMS—in terms of setup, running the course, and tracking the results."

In addition to leveraging ToolBook's flexibility and strong assessment types for creating effective e-learning courses, the Card Services organization now has the added benefit of using assessment tools and question widgets that are fully integrated between ToolBook and the LMS. This allows the e-learning team to imbed full-fledged assessments throughout, and at the end of, its online courses.

Another important feature of ToolBook is its "out-of-the-box" capability to track question-level details in an assessment—which, in turn, enables the Team to identify any existing knowledge gaps. For example, the Team can use ToolBook to quickly analyze the answers of 5,000 employees for each question on a particular assessment. If a knowledge gap becomes apparent, the training team can rapidly develop an appropriate action plan to address the issue.

▶ THE RESULTS

> **"** *With ToolBook and the SumTotal LMS, we are able to deliver over 300,000 operations and compliance CBT courses and assessments each year* **"**
>
> **- William Loucks**

For Chase Card Services, the ToolBook solution has evolved from being an experiment in 1999 to a vital component in its daily training processes.

"With ToolBook and the SumTotal LMS, we are able to deliver over 300,000 operations and compliance CBT courses and assessments each year," says Loucks. "And in 2007, we passed the one million online completion mark."

Loucks credits ToolBook's functionality with the company's progress in training achievements. "Every day, hundreds of Chase Card Services employees launch CBTs directly from their home pages in the LMS," he says. "All participation and pass rates are fully tracked. This tracking permits the Performance Improvement Team to know if the target audience has completed its training and achieved an appropriate score."

ToolBook is also versatile enough to support full-fledged authoring and the development of templates used by instructional designers. Chase Card Services looks forward to leveraging these features for continued training successes.

For more information, please contact us at +1 650 934 9500, or toll-free at +1 866 768 6825.

SumTotal.