Case Study:
CUNA

SumTotal is enabling the Credit Union National Association (CUNA) to easily develop and publish their own online courses and exams. With SumTotal, CUNA has reduced the time it takes to publish a course from several months to less than one month. SumTotal's capabilities have reduced the time it takes to track and report results, while increasing the accuracy of employee training records. For the first time, CUNA is able to offer credit unions in the United States an enterprise solution for tracking learner progress and measuring return on investment.

With its network of affiliated state credit union leagues, CUNA serves more than 90% of America's 10,700 credit unions, which are owned by more than 80 million consumer members. Based in Washington, D.C. and Madison, Wisconsin, CUNA provides a wide spectrum of services to its credit unions, including regulatory advocacy, information, public relations, continuing professional education, and business development.

CUNA's Center for Professional Development (CPD) is responsible for providing training and professional development to frontline staff, managers and volunteers of credit unions. Over the years, CPD has utilized a variety of delivery channels including self-paced print courses, instructor-led training, instructional videos, CD-ROMs and satellite programs.

The Challenge

Historically, credit unions have had the option of purchasing staff training from one of the hundreds of service providers in the training industry. In order to compete more effectively, CUNA wanted to add a comprehensive web-based training program to its portfolio of service delivery channels. After a year and a half in the business, CUNA also wanted to move away from a reliance on content development by vendors, and instead invest in growing the expertise internally. The newer business model offered a decrease in production time and costs. CUNA also recognized web course development as a resource that could be marketed to other companies developing content. Finally, the company wanted to automate its entire training process to reduce the time employees were spending on administrative tasks such as faxing transcripts.

The SumTotal platform has enabled us to centralize record keeping for all training and development activities, providing both managers and students easy access to training and comprehensive transcripts. For the first time, managers will be able to assess the return on investment of their training activities. In

addition, by integrating with our ERP system, SumTotal has significantly reduced the time and expense associated with tracking student information.

Mike Miller,
VP, Center for Professional Development, Credit Union National Association

The Solution

CUNA required a platform that would integrate easily with its ERP system, while providing a dependable and scalable software infrastructure. After evaluating several Learning platforms, CUNA selected SumTotal. The evaluation committee favored SumTotal's compatibility with the company's business model, the user-friendly interface and SumTotal's ease-of-use, which would allow the company to begin publishing courses to the Internet. CUNA was also impressed with SumTotal's global customer base, commitment to on-going software improvements, and their leadership and vision.

Prior to installing SumTotal, transcript information had to be manually keyed in to the ERP system. Now student transcript information is automatically updated from the SumTotal platform to the ERP system on a daily basis. CUNA set an internal goal to develop one online course last year, but was able to create two courses in just over one month using SumTotal. The company is well on its way to meeting its goal of publishing five courses in this year, with four already completed in the first quarter.

Not only will the SumTotal solution give credit union managers a means to measure the return on the employee training investment, it will also serve as a tool for all credit union employees to track their progress toward career goals. For example, credit unions can run reports to review both individual and organizational training activities. Managers, employees and volunteers can access online course catalogs, personal transcripts for all CUNA training activities, competency tests, and other features

designed to identify the shortest path to help them meet their training goals.

Eventually transcripts will cover all training activities, not just those provided by CUNA, giving managers a comprehensive picture of each employee's educational background. A career path module is also in development. This tool will enable employees to complete their own skills gap analysis. Employees will also be able to view competencies required for other positions within the credit union.

CUNA's five-year business strategy is to continually evolve and refine its web-based training program based on an ever-changing marketplace. SumTotal is at the center of the company's learning and performance management business model — functioning as the delivery channel for all credit union training and staff development.

For more information

To learn more about Stranix please visit: **www.stranix.com**, or contact Stranix Sales at Telephone: 214 432 8261

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