

## LMS Powers Customer Service at Bethpage Federal Credit Union

### *The Problem*

Just a few years ago, operations at the Learning Center of this Long Island, New York-based credit union were entirely manual — a spread-sheet for this and a spreadsheet for that. Later, an Access database helped maintain some training records, but Learning Center Manager Melissa Feeney knew that her de-partment needed true au-tomation —the kind of automation that only a learning management system (LMS) could pro-vide. With extraordinary customer service as one of the organization's core values, it was clear to Melissa Feeney that training was the only way for Bethpage's 280+ employees to achieve and main-tain these high levels of service. She and Diane Krieger, Learning Center Assistant Manager/ In-structional Designer, began an exhaustive search for an LMS that would meet their needs. Diane's programming background helped greatly as they researched 60 possible products. By the time they narrowed the search down to a handful of ven-dors, Gyrus Systems, with its LMS Training Wiz-ard™, was in the running.

"Giving extraordinary customer service is a way of life at this New York credit union, so receiving it from vendors is a must."

### *The Solution*

After much research, several demos, and a great deal of "lifting the carpet and looking under," Gyrus was the clear winner. "Service is critical to us," says Melissa, "and we developed a real rap-port with the people at Gyrus, a real camaraderie. We have high expectations and high standards, and Gyrus has always exceeded our expectations. They are amazing."

### *Effortless Implementation*

The implementation went smoothly. Two Gyrus staff members made an onsite visit, installing Training Wizard MX in the Learning Center and its bundled intranet/Internet online enrollment application, Self Service Training MX™ (SST MX), in the branches, ready for a phased rollout. According to Melissa, "We were worried beforehand, of course, anticipating that something might go wrong with the installation. But in the end, it was transparent. It was like expecting a shot and getting a lollipop." As Diane often quips, "Did I ever tell you how much I love Gyrus?"

### *Effortless Implementation*

Employee learning at Bethpage is delivered in a variety of formats, including instructor-led and online courses, the vast majority of which Diane creates herself. Over 70 different courses cover such topics as banking systems, credit union his-tory, diversity training, job related training such as cash handling, and soft skills like time man-agement, presentation skills, business writing, and overcoming

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objections. Bethpage's training goal of 35 hours per employee per year ensures that the two full-time facilitators, along with Diane and, to some extent, Melissa, spend a great deal of their days in training classes. They have exceeded this goal in each of the last three years. With this many employees to train, Melissa and Diane appreciate the value of Training Wizard MX and SST MX. "We piloted SST in one department and then rolled it out to more," says Diane. "Managers use it to enroll their employees in classes. This frees us up from doing enrollments, and it is really the managers who know best which employees should be waitlisted and who should be enrolled immediately."

According to Melissa, "SST puts the control in their hands. Plus, the managers have direct access to each employee's curriculum progress, training hours, and transcripts, all just a click away. This makes for shared responsibility in employee development."

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*Melissa Feeney*

**Learning Center Manager**

### *Dollars and Sense*

Another selling point for Bethpage was the cost-effectiveness. The core features of Training Wizard MX and SST MX are tailored to training management, without the need for expensive customization. Gyrus also helped Melissa and Diane see how they could make the product duo fit their specific needs. "Gyrus focuses on what we're doing with

Training Wizard MX and our business, not what other companies are doing with it," says Melissa. "I feel like I'm their only customer. Their suggestions have shown us how to save time, save money, and become more accurate and more effective."

### *Compliance Tracking*

Compliance with industry regulations is critical in banking, and training in new and existing procedures, such as the Patriot Act, fair lending rules, and Check21, is ongoing. "Gyrus knows a great deal about our business," Diane remarks. "They know exactly which fields we should use to get the data we need. They remember things we've said, even just things we mentioned in passing. They are genuinely interested in our success — both personally and as an organization." "When a new regulation comes out," says Melissa, "we can now avoid the 'cattle call' type of training by offering online videos, job aids, and management tool kits instead. With Training Wizard MX, we can still track when this training is done and even include testing."

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"The comparison between the level of administrative tasks just a few years ago and today is astonishing," notes Melissa. "The manual processes we had to go through just to record everyone's curriculum progress was outrageous. Now it's all there at the touch of a button. And scheduling classes used to be so tedious. We used to have a huge desk calendar that we would write on in pencil. Today scheduling is so easy, especially finding out instantly if there is a conflict with a facilitator or a training room."

### *Measuring Training Impact*

Measurement of training impact is an important, yet often daunting, task for an organization. In 1959, Donald L. Kirkpatrick, Ph.D., published a series of four articles called "Techniques for Evaluating Training Programs." As a past president of the American Society of Training and Development (ASTD), Kirkpatrick was highly qualified to create a model describing the four levels of training evaluation: 1. Reaction; 2. Learning; 3. Behavior; and 4. Results. Jack J. Phillips, Ph.D., Knowledge Advisors advisory board member, later added a fifth level: ROI.

According to Diane, "We have always been able to track levels 1, 2, and 3, although it's much easier with Training Wizard MX. Now we can also do Level 4, and we're even getting at the ROI data we need for Level 5. We are working on showing a return on investment for our training, which puts our department in a whole new light for management," Says Feeney.

Training is aligned with our corporate goals. We can easily report to management on the training hours per employee, for example, broken out by department. Since learning is one of our core values, management places a high value on what we do."

### *Internal Communications*

Training Wizard MX and SST MX have also improved communications at Bethpage. "So much information is out there in SST MX for managers and employees to see," notes Diane. "Now employees will call us if they think something might be missing in their transcripts. Before, if we asked them for information on what training they had taken, their attitude was often, 'Why do you want to know?' Now they realize we are trying to help them, and they want to be a part of it. We can share ownership and accountability on to managers and employees, and this makes for much more cohesive teamwork."

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*Diane Krieger*

**Assistant Manager / Instructional Designer**



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### *Looking to the Future*

The future of Bethpage and Training Wizard MX looks bright. Having just returned from a three-day custom reporting class at Gyrus head-quarters on Training Wizard MX's bundled report writer, Crystal Reports, Melissa and Diane are prepared to tackle even the most challenging data. "We want to get at the data that drives the business," notes Melissa. "We want to be able to show curriculum progress in a graph, for instance, which works best for upper management, as well as the numbers. Numbers say a lot, and after all, as a credit union, we are all about the numbers." Although custom report writing is not for the un-initiated, Melissa and Diane enjoyed the class and the opportunity to spend more face time with Gyrus. "We work with a great many vendors," noted Diane, "and we have a lot that we can compare with Gyrus. But as I always say, 'We love Gyrus!'"

Bethpage Federal Credit Union is a large, full-service financial institution serving those who live, work, worship, or go to school in the counties of Nassau and Suffolk, New York. Founded in 1941 as a service of the Grumman Corporation (now part of Northrop Grumman), the credit union now has assets of over \$2 billion. As a not-for-profit membership organization rather than a bank, Bethpage comprises more than 130,000 members nationwide.

Website: <http://www.bethpagefcu.com>