PSCU takes a blended approach to onboarding Call Center employees

About PSCU
Since 1977, PSCU has been a leading provider of traditional and online financial services to credit unions. They represent more than 800 credit unions, making them the nation's leading Credit Union Services Organization (CUSO). They offer industry-leading credit, debit and prepaid card servicing to more than 18 million cardholders and innovative bill payment solutions to over a million online bill payment subscribers. They also provide a range of ecommerce solutions options to include electronic home and mobile banking. All of these services are backed by outstanding support from their 24/7/365 contact centers located throughout the United States.

Business Conditions
As in many call centers, turnover is high and the investment in training is substantial. Total Member Care (TMC), the business unit that services all the member credit unions, wanted a streamlined program that allowed them the flexibility to use pieces of the training program for refresher training needs as well. They had multiple training programs, new hire and refresher training needs, and limited facilitator resources. The new hire training program was comprised of four weeks of instructor led training, and lacked consistency across sites and facilitators. If there were other training needs, TMC had to wait until a trainer was available. The business was desperate to improve the quality of the learning, reduce the length in the classroom, and create a more agile learning program.

“This learning content management system was critical in the successful development of this program. We could not have deployed this blended learning curriculum without it. We didn’t have the necessary tool before we got Xyleme.”

Gina Lensky,
Master Learning Architect
Solution

After analyzing the business and learning needs for TMC new hire training, they decided to pilot a blended learning approach to replace the standard four-week classroom instructor-led new hire training program. PSCU selected Xyleme to help them define and implement a content strategy that allowed for the creation, quality assurance (review/edit), publishing, and distribution of learning content from a single source. The intended outcome was to reduce or eliminate inefficiencies during the production cycle. By centralizing content development efforts with Xyleme in Studio and distribution efforts in the Content Delivery Service (CDS), administrative overhead could be significantly reduced. The authoring environment would allow them to streamline collaboration between designers and subject matter experts while adding version control to ease ongoing maintenance.

The Program

The key goals identified at the beginning of the project were to accomplish a 20% reduction in classroom training time - resulting in significant cost savings - while maintaining quality of service and to increase time to performance by 10%. It was also the desire of the business to have a more flexible program that could be used to meet other training needs of existing representatives.

Within 12 months, PSCU was able to implement Xyleme and re-launch the TMC Member Services New Hire Curriculum as an eight-day blended learning program that teaches a Member Services representative how to effectively service credit union members’ calls by using their excellent customer service skills, tools, and resources.

This newly-designed program includes a combination of delivery methods and modalities:

1. Instructor led content
2. Instructor led activities
   a. Individual activities
   b. Group activities
3. Instructor led review sessions
4. Web based training modules with:
   a. interactive content
   b. built-in knowledge checks
5. Web based simulations and video demonstrations
6. Web based assessments

“The blended learning approach, along with the Xyleme single-source content strategy enabled not only the improvement in learning, but established a new method of content design, development, and delivery.”

Karlene Stewart, 
VP, Talent Systems & Operations - 
PSCU
The pieces of the program are an intertwined combination of asynchronous and synchronous learning designed to boost retention of information and to monitor the progress of all learners. The final section is a one-week OJT nesting period supported by the business unit.

The main objectives of the program are to provide the knowledge and skills to:

1. Connect the Credit Union Industry model to PSCU and TMC Representative role.
2. Demonstrate mastery of soft skills to delight the member on each call.
3. Apply knowledge of financial industry products and services to respond appropriately to member issues.
4. Effectively navigate and use required software systems.
5. Solve call scenarios by applying knowledge of systems and call flow tasks.
6. Demonstrate effective use of the phone system.

“We are now creating all new content using the blended approach in Xyleme. This offers the added benefit of reusing learning objects across multiple programs. We know that we can improve on optimizing the reusability strategy that Xyleme empowers us to do.”

Karlene Stewart,
VP, Talent Systems & Operations - PSCU
Learning Delivery Integration

When designing the system integration strategy, PSCU had to consider both user and content access, in addition to reporting. Because this project was targeting internal employees, they could focus their efforts on:

1. Single Sign on with their internal identity provider – Active Directory
2. Xyleme and Cornerstone LMS content integration

But they also wanted to consider future needs. Already in play was an HRIS system that required employee training records, and a Learning Management System serving their external customers. They also wanted to ensure that learning content would be accessible to outsource call centers, in case this need arose in the future.

Content Delivery Service

In Cornerstone on Demand (CSOD), the learner could access the curriculum and track their progress. The curriculum was organized into modules, including the various delivery types: WBTs, instructor led sessions, activities, job aids, and assessments. It was constructed with prerequisites, and the learner was required to complete the program in the order it was intentionally and effectively designed. This gave the learner a “path to success” in a very easy-to-use and visual interface.
“We knew for a long time that this was the right way to serve our organization’s learning needs, we just didn’t have the tools to do it. In addition, our Xyleme partner was supportive and invaluable in this project.”

Karlene Stewart,
VP, Talent Systems & Operations - PSCU
Change Management

The implementation team at PSCU did not underestimate the change management efforts required to implement two learning systems, a critical learning program, and a content strategy that would carry them into the future. Change Management and Project Management practices were implemented and reinforced throughout the project. They began with the Business Case for Change: Why we are changing? What is changing? and What is the impact? They conducted face-to-face meetings with senior management to ensure buy-in and sponsorship up front. They conducted intentional touch-point meetings along the way to reinforce engagement and sponsorship, which kept senior leaders involved throughout the entire project.

Later in the project, they conducted demonstration sessions of sections of the program for supervisors in the call centers. This was a strategy to engage the supervisor level, address any concerns or resistance, and to gain support and buy-in.

Throughout the development phase, each piece was reviewed and approved by the designated subject matter expert. TMC Leadership also participated in this process, which was another technique PSCU used to validate buy-in and support.

“The other key finding was the validation that the sponsorship and support from the business is critical to fully realize the outcomes. Just because we built it, doesn’t mean they would embrace it. Their engagement in the project throughout the process was a key to its success.”

Karlene Stewart, 
VP, Talent Systems & Operations - 
PSCU
The Results

This successful Member Services new hire curriculum has now been rolled out to all call center sites, resulting in:

Reduced classroom training and cost savings

The program shortened from four to two weeks. (This includes a two-day Orientation program.) The 50% reduction in program training time will save the company a conservative estimate of $700,000 annually.

Time to Performance

There has been a 15% increase in the Quality Scores 30 days post-training. In addition, with the representatives going to the floor two weeks earlier, they are generating revenue that much sooner. Based on an average number of calls per rep per week, this equals additional potential revenue of $1.8 million annually.

Content Reuse

Even before the program was completely designed, the soft skills module was reused as refresher training for all representatives. In fact, this module was also reused as a refresher in OTHER business units. The phone module has been used for another skill set in the call center. There are many modules that can now be taken and used to reinforce and improve performance of existing representatives.

The PSCU training group has a number of internal programs to redesign using the blended approach, leveraging Xyleme to help them do so. By selecting a high impact pilot program, they were able to learn the system quickly, get tangible results within the first year, and show ROI.

“You were able to reduce the curriculum by two full weeks and net better prepared and confident agents. After five weeks, all 20 agents are still employed and successful in their new role! This is unparalleled and a testament to the program designers.”

From the VP of Call Center Operations to Program Designers
“Overall, this project has far exceeded not only our expectations, but also those of our internal business unit, TMC. The impact to PSCU has been valuable not only in dollars but in goodwill and reputation with our credit unions. The credit unions that have seen portions of our program have all wanted to know how they can follow our lead.”

Karlene Stewart,
VP, Talent Systems & Operations -
PSCU

ABOUT XYLEME

Learning content has the potential to change your business and drive incredible results. Are you ready to unleash its power? You will be with Xyleme.

Xyleme content management for learning and development gets critical information into the hands of your end users quickly and effectively. Transform the way you deliver that information — with an end-to-end solution to author, publish, deliver, and analyze learning content. Xyleme supports both formal and informal learning, giving instructors the ability to create and collaborate on compelling training resources that are future-ready. Connect your learners to personalized, bite-size content at the moment of need, and give your authors the ability to create content that is able to change with your business. Xyleme’s rapid single-source content development and anywhere delivery mean you can respond to your learning challenges without compromise.

If you’re tired of hard-to-access learning content that doesn’t make a positive impact on your business, it’s time to try the alternative to boxed-in, inaccessible content. Xyleme is your learning content transformed.

Xyleme is headquartered in Boulder, Colo., and can be found online at www.Xyleme.com.