

Credit Union Atlantic Strives Toward the Ideal Customer Service Experience

At its 2006 strategic planning session, Credit Union Atlantic (CUA) coined the term the “Ideal Customer Service Experience.” Through a series of employee focus groups, employee satisfaction surveys and feedback, this credit union found that compensation, promotion opportunities, enhanced communication and training were paramount on employees’ minds. Addressing them would be a pre-requisite to achieving the “ideal customer service experience.”

By the fall of 2008, the definition of the “Ideal Customer Service Experience” provided a natural springboard to tackle the final and most time-consuming item: training and development (T&D). From there, the CUA training and development model was born.

It is a model that recognizes employee T&D as a priority; consequently, CUA has integrated the personal and professional development of its employees into its organizational culture and chose to partner with CUSOURCE Knowledge Network to meet its goals.

Four Cornerstones

CUA employees identified what the company calls the “Four Cornerstones of the Ideal Customer Service Experience”:

- CONSISTENT
- ENGAGED
- KNOWLEDGEABLE
- PROFESSIONAL

“It is on these four cornerstones that we developed our company-wide training standards platform,” says Isnor Conrod. “CUSOURCE Knowledge Network has very good courses that are well priced and with a credit union focus. We didn’t want to re-invent the wheel.”

CUA evaluated all of the educational opportunities offered by CUSOURCE Knowledge Network. With its combination of e-learning and classroom courses, *CUICP*[®] courses and the Management Development Series (MDS), the credit union feels CUSOURCE Knowledge Network provides the diversity it needs to ensure employees, and in turn the organization, reach their goals.

New Position Sends Message about Learning & Development

In 2009, CUA took the next step by creating a new position focused entirely on learning and development. Lisa Dewolfe was promoted to the role of the Learning and Development Consultant, a first for CUA. Dewolfe’s fifteen plus years of credit union experience, combined with a certificate in adult education from Dalhousie University, made her the perfect fit.

As part of the HR team, Dewolfe started to create formal development plans for each employee. Working with the employee's job profile and their personal learning and development goals, Dewolfe formalized these plans in the *CUSOURCE*[®] Learning Management System (LMS). This allowed both Dewolfe and the employee's manager to track, record and report on successes and areas of opportunity.

Making it Happen

To achieve their goals, Dewolfe first enrolled each employee in the e-Learning Foundational Library. Next, she worked on adding development plans, or maps, to individual employee performance plans. T&D standards were established requiring, for example, that all new Financial Service Representatives complete the MSR Start Series.

"We've had very positive feedback from employees. People have been waiting for this," says Dewolfe. "When an organization says it's committed to learning and development, you need structured training plans and requirements, not just a few courses here and there."

Beth Tenwolde, a senior-level MSR who mentors the new hires, loves the idea of planned training and development. "It's great to have a clear path and know what to do to get from point A to point B. There's no guessing. You can now plan ahead and work on courses. We are very happy," says Tenwolde.

Isnor Conrod comments further. "In the past, people made an education request and it was approved. We have moved away from that push-pull approach," says Isnor Conrod. "Now, with this planned, directed, focused approach, our attrition rate is enviable," she says with pride. "Everyone at CUA wants to achieve the Ideal Customer Service Experience."