



May 2009

Front-line training made easy & efficient One credit union's story

Traditionally seen as an area with one of the highest staff turnover rates, Member Service departments face a tough challenge of minimizing training costs while offering effective and well-rounded preparation for the front-line roles of MSR's.

That's why when Kathy Keast, VP Human Resources & Branch Operations at Portage Credit Union, MB, heard about the MSR Start Series pilot in 2008, she immediately saw it as an opportunity to fill the need for a structured and efficient training program.

In February 2009, Portage Credit Union registered their newly-hired MSR, Laverna Broesky, in the MSR Start Series. Other staff involved in training – the mentor, Donna Clayton; the trainer, Bernice Scaling; and Assistant Manager, Member Services, Debby Panko – were also taking part in the Series.

"We saw some immediate benefits," says Keast, including a more consistent training platform that resulted in reduction of staff stress levels thanks to the structure and outline of expectations that accompany the program.

"This is a very cost effective program, and a very realistic way to provide training," says Keast. As a result, Portage will now incorporate the Series into their training program for every new MSR, and even offer it as an option for existing MSR's.

Although skeptical at first, Bernice Scaling, Supervisor of the Member Services Department who trained the new employee, fell in love with the program.

"I have to tell you, it was absolutely wonderful," she says. "We followed the MSR Start Series exactly as planned and it was very easy to follow. It gave the new employee much broader learning, and helped her develop in the role faster."

Scaling also said that thanks to the program, she envisions the ability to train more than one person at a time – making the training process more efficient than ever.

For more information on the MSR Start Series see the brochure, or call your Regional Office. Also, join Kathy Keast and her team, along with Corelei Poyser of Westoba Credit Union, in a Power Hour webinar on May 21.

Project Management Institute (PMI) announces July 1 deadline

Please note that effective July 1, 2009, all PMI certification exams will be based on Project Management Body of Knowledge (PMBOK) 4th Edition.

This information is important for anyone currently enrolled in the Project Management Library on the LMS who is pursuing a PMI certification. For more information, visit www.pmi.org.

About Project Management Library

Available on CUSOURCE® LMS, the Project Management Library is designed for team leaders and all employees who are interested in the principles and methodologies of project management. For more information please see contact your Regional Office.

Reminder: Register by May 15 for CUIC® and CUDA June Exam

Friday, May 15 is the deadline to register for the *CUIC* exams taking place on June 17, 2009.

For those who registered in their *CUIC* course between March 1, 2008 and July 31, 2008 - this is your last opportunity to write the exam. For more information on *CUIC* Exams, click [here](#).

For more information about any of the items in *eNews*, [contact](#) your Regional Office.

Introducing *CUSOURCE*[®] National Power Hour Webinars in May 2009

We are pleased to launch a new series of free national *CUSOURCE*[®] Power Hour webinars. Space is limited, so sign up today! Please note, all webinars with the exception of CUDA Exam Preps, are running at 1 pm EST.

The MSR Accreditation Program - What is it?
Tuesday, May 12. Register by Friday May 8
Tuesday, May 26. Register by Friday May 22

Cohorts - What are they?
Wednesday, May 13. Register by Tuesday May 11
Wednesday, May 27. Register by Monday May 25

Implementing the BRM Program
Wednesday, May 20. Register by Friday May 15

Implementing the MSR Start Series
Thursday, May 21. Register by Tuesday May 19

CUDA Exam Prep Webinars: there is a fee of \$95 per participation per event:
CUDA Exam Prep via CUSOURCE Live - Cluster 1
Monday, May 25 at 7:00 pm EST
Register by Thursday May 22

CUDA Exam Prep via CUSOURCE Live - Cluster 2
Tuesday, May 26 at 7:00 pm EST
Register by Friday May 21

To register, login to [CUSOURCE[®] LMS](#). Click the green "Catalogue" icon > By Topic > Webinars. For more information on the webinars please see the [Webinar Schedule](#).

CUIC[®] Courses offer study options for everyone

Cohorts, or structured "online learning groups," offer a great alternative to independent study for individuals taking a *CUIC* course. The subject experts who facilitate the cohorts help employees stay motivated and moving through the course, and are available to answer questions and

encourage networking among participants. Plus, employees earn marks for participation, assignments and the final exam - great for those who dislike the pressure of their mark resting entirely on one exam. The cohort study option is currently available for five *CUIC* courses:

CU00-185 Credit Union Products & Services
CU00-200 The Credit Union System
CU01-210 Consumer & Residential Mortgage Lending
CU00-240 Fundamentals of Personal Financial Planning
CU01-345 Commercial Lending

Registration is now open and closes on September 25. Courses start the week of October 12. To avoid missing the deadline, employees should allow sufficient time for managers to approve their registration. Space is limited, so act quickly!

Official Recognition Program Rewards MSRs

The *Accredited Member Service Representative* Program is a national designation program that awards professional recognition to those who have mastered the knowledge, skills and behaviours of being an MSR. The program recognizes both formal as well as "on-the-job" learning, and measures MSRs against national, industry-defined performance standards in six key result areas.

The MSR Accreditation Program involves completing a specially designed logbook, passing the exam and, for some, an external evaluation consisting of a third party mystery shop and interview. To register, login to the [CUSOURCE[®] LMS](#) and enter CU00-SSRACC in the Catalogue Search field. Click GO.

Before an MSR can go through this Accreditation program, their supervisor must complete the **Supervisor Orientation (CU01-STSRACC)** to the **MSR Accreditation Program**. Registration is now open for the October session; registration ends September 24. Contact your Regional Office for more information on this and other designations offered by CUSOURCE Knowledge Network.