

Clarity Helps CUNA Mutual Streamline Operations

Challenge

CUNA Mutual Group, a global provider of financial services and insurance products to credit unions, initiated a large systems project to automate many tasks that were normally completed manually for customers. In addition, many smaller systems were replaced with one larger, more complex system to streamline operations and reduce operating costs.

Opportunity

This large-scale project involved several subprojects, including technology development, job redesign, and training support. Clarity provided an experienced project manager and several instructional designers to meet the client's training needs.

Results

After performing a careful analysis and working with the project teams, the consultants identified three key deliverables. First, the consultants used Captivate® to create Web-based



training modules that gave end users hands-on practice performing routine tasks in the new system. Next, the consultants developed instructor-led training that emphasized all the nonroutine tasks and exceptions, with lots

of additional hands-on practice. Lastly, the consultants developed an Electronic Performance Support System (EPSS) using Documentum as the platform to provide an online source for end users to access information on all types of transactions, systems functionality, and process steps. These three solutions addressed the end users' learning needs effectively and efficiently.

► Do you have critical projects to complete, but lack the necessary resources to get the job done? [Contact us.](#)



Clarity enabled the client to:

- Get employees quickly up-to-speed on the new system.
- Have online learning available for future new hires.

