

Software Implementation Training:

A Credit Union Study in
Sustainable, Role-Based Learning

Executive Summary

With limited capacity and experience in delivering digital training and without any learning management infrastructure, a credit union client was unsure how to address their training needs for a newly remote workforce. Innovatia saw an opportunity to streamline their training and deliver a digital, self-directed, eLearning program that would help them to achieve three main business goals; reduce the cost of training through an overall reduction in training hours and trainer effort; design a flexible training program that supports their remote workforce and streamlines the training requirements for each corporate role; maximize ROI by creating training assets that are easy to update and maintain, thus increasing the longevity of the solution. The results not only drove business value but also reduced program seat time by 50% while developing capability and capacity.

The Challenge

A regional credit union faced a critical challenge during a new software implementation. Their project team had developed comprehensive training materials and planned sequential onsite classroom sessions across multiple branches. However, circumstances shifted dramatically, requiring an immediate pivot to remote delivery — without a learning management system (LMS) or digital training experience.

The organization needed **software implementation support** that would address three core business objectives:



Reduce training costs
through decreased seat
time and trainer effort



Enable user adoption
with flexible, role-based
training that supports
the remote banking
workforce



Maximize ROI
with maintainable
training assets built for
long-term use

Our Learning Services Solution

We designed an **end-to-end software learning program** that transformed their traditional approach into a modern, self-directed program. Our solution puts banking staff at the center of their learning experience through:

Workflow-Based Learning Architecture

Rather than system-feature-based training, we focused on job-role tasks that staff need to perform daily. This system-skills development approach ensures learners acquire practical competencies aligned with their actual responsibilities.

Modular eLearning Design

Short, focused modules fit seamlessly into the workday, with progressive practice opportunities that incrementally qualify staff as they advance through the program. We delivered practical financial services workforce training without disrupting operations.

Comprehensive Training Guidebook

Recognizing that the credit union's staff were new to self-directed learning, we created a detailed guide covering program goals, outcomes, terminology, and resources. This onboarding tool includes direct links to all training materials hosted on the organization's shared network, ensuring accessibility for all staff regardless of location.

Strategic Content Development

We analyzed existing training materials, webinar recordings, and user guides to identify required tasks and align the new program with current resources. Using tools the client already owned (Microsoft Office, Adobe Acrobat, Articulate 360), we created sustainable training assets.

Deliverables

Learning Blueprint, eLearning Modules, Animated Video, Training Guidebook, Development Templates, Maintenance Tutorials

Results: Measurable Impact on Workforce Capability

Our software implementation training program delivered substantial business value:

50% Reduction in Seat Time

Streamlined, role-specific training eliminated unnecessary content and accelerated time-to-competency.



Personalized Learning Paths

Individual staff receive tailored training experiences—precisely what they need to complete their job tasks, nothing more.

Scalable Delivery Model

Global access enabled simultaneous training across multiple branches and remote workers, replacing sequential onsite sessions and dramatically increasing training capacity.



Sustainable Training Infrastructure

By leveraging the client's existing tools and providing development templates plus "how-to" tutorials, we ensured the implementation team could update existing materials and create new **software customization training** content independently.

Overall, the self-directed eLearning program reduced seat time by 50%. Employees have a tailored training experience that equips them to complete their job tasks. By providing global access to the training materials rather than scheduling sequential on-site sessions with the trainer, our client can train multiple offices and remote workers simultaneously.

We increased our client's ROI by developing training materials using tools they already had (Microsoft Office, Adobe Acrobat, Articulate 360). By providing their project implementation team with development templates and "how-to" tutorials, they can maximize reuse, make their own updates, and create new training materials in the future for flexibility and scalability.



The Innovatia Advantage

This engagement demonstrates our approach to software and **system change management in financial services organizations**: we don't just deliver training—we build capability. Our **learning and development services** create sustainable solutions that reduce dependency on external resources while maximizing the longevity and ROI of training investments.