



Credit Card New Hire Training

*Measuring Training effectiveness through
Business Impact*

 **USAA HR Learning and Development**
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Who We Are

Our Mission

The mission of the association is to facilitate the financial security of its members, associates, and their families through provision of a full range of highly competitive financial products and services; in so doing, USAA seeks to be the provider of choice for the military community.

Our Core Values

Service ◆ Loyalty ◆ Honesty ◆ Integrity

Our Brand Promise

GOING ABOVE

— ◆ —
FOR THOSE WHO HAVE GONE BEYOND

Our Brand Pillars



Shared
Military
Values

Financial
Strength
& Wisdom

Passionate
Member
Advocacy

- ❑ **Agile Evaluation Process**
- ❑ **Credit Card New Hire**
- ❑ **Business Impact Results**
- ❑ **Q&A**

Agile Evaluation Process

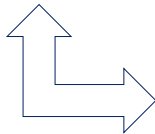


Pilot Feedback



DELIVERABLES

Feedback (PC, Design & Delivery)
Level 1 Exec Summary (M&M)



Class Evaluation F2F – 45 days after class

DELIVERABLES

30 day Exec Summary
Level 1 & 2 Results
Next Steps
Re-Engage (Y/N)

Class Evaluation Email – 70 days after class

DELIVERABLES

60 day Exec Summary
Trends/Themes
Level 3 Results
Next Steps
Re-Engage (Y/N)

Final Class Evaluation F2F – 100 days after class

DELIVERABLES

30/60/90 day Presentation
MSR/Focus Group Results
Business Impact Results
Recommendations
Action Items
Next Steps

Dates/number of classes, and timing of certain deliverables will be negotiated during the Blueprint phase.

Credit Card Overview

Purpose:

Report the results of the reinvented Credit Card Pipeline training. The brief encompasses four classes in three locations: Tampa (Pilot), San Antonio, Tampa, and Phoenix.


Evaluation Strategy:

- Administer reaction questionnaire (Level 1 survey) to MSRs immediately after class to analyze and provide early on results to stakeholders
- Conduct focus groups with Member Service Representatives (MSRs), lead Instructors, and receiving Managers approximately 30 days post-training.
- Administer behavior questionnaire (Level 3 survey) to MSRs and Managers 30 days post-training.
- Track business success performance measures and targets 30/60/90 days post training, and analyze the results.
- Provide the business client with the results, make recommendations based on findings and develop an action plan.

Cohorts in Evaluation Study

Class Location	Class Dates (4 Classes Total)	# of Participants (60 Total)
TPA (Pilot)	03/14/16 – 04/29/16	16 <i>Manager #1</i>
SAT	05/31/16 – 07/08/16	16 <i>Manager #2</i>
TPA	06/07/16 – 07/25/16	15 <i>Manager #3</i>
PHX	06/13/16 – 08/01/16	13 <i>Manager #4</i>

Reinvention Stats



\$215,690 in Labor Productivity Gains Returned to the Business!

	Before	After
Total Course Days	65	50
Total Course Hours	208	248
Total Program Days	56	41

15 Day Total Program Reduction!!

Business Impact

Project Cost = \$2,079,121.

Total Products Sold = 1,465 *(post 90 days, 4 classes)*

Cost per product = \$601.57 (2017)

Total NPV = \$881,300 *(post 90 days, 4 classes)*

- Approximate products sold per rep, per year = 68
- Approximate products sold per class, per year = 210
- Approximately 20 classes to date (2016-May 2017)
- Total NPV to date = \$2,526,594.

**These numbers do not represent a complete ROI investigation*





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