



M&T Bank

SUMTOTAL® CUSTOMER SUCCESS

▶ THE COMPANY

M&T Bank is considered one of the country's most highly regarded regional banks. Founded over 140 years ago in western New York, where it is still headquartered, M&T Bank Corporation has over \$52 billion in assets and is one of the 20 largest bank holding companies in the U.S. With branches located throughout Delaware, Maryland, New York, Pennsylvania, Virginia, West Virginia, and Washington D.C., M&T Bank is recognized for its financial strength and sound management. This, along with an entrepreneurial philosophy, has allowed the bank to pursue a course of well-managed growth.

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STRONG TEAM, STRONG BUSINESS.

CASE STUDY

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▶ THE CHALLENGE

Over the past 18 years, M&T Bank has rapidly increased its size and expanded into new geographic markets through 15 acquisition initiatives. Training these newly acquired bank employees on the M&T Bank systems, products and procedures while maintaining a curriculum of regular classes throughout the bank's footprint was becoming an increasing challenge with a minimal training staff.

In 2001, the Corporate Training and Development department, headed by Lynne Kreiner at the time, turned to Web-based-training (WBT) as an alternative delivery method to reach large numbers of employees spread over wide geographic areas in a short period of time. The Corporate Training staff partnered with the bank's internal Web development department to create three WBTs that were delivered over their Intranet to branch personnel at their desktops. The response to these Web-based trainings was enthusiastic. This was encouraging, but without a formal platform to develop, deliver and track WBT, it was a cumbersome process.

In 2002, Kreiner formed a cross-functional LMS Study Committee consisting of representatives from the major business units of the bank and the internal technology group. The goal of the committee was to recommend a bankwide system to develop, deliver and track all learning events. After completing thorough research, a formal RFP process, vendor demonstrations, and reference checks the committee narrowed the Learning Management System (LMS) vendors down to three.

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- **Lynne Kreiner,**
Corporate Training and
Development M&T BANK

Before a final LMS vendor was selected, the bank announced the acquisition of Maryland-based Allfirst Bank in 2003. “Although we had become quite adept at conversion training over the years, the size and geographical locations of this particular merger presented new and heightened challenges,” Kreiner said. Fortunately, in the due diligence process, it was discovered that Allfirst had the Click2learn system (subsequently SumTotal Systems), which was known to be one of the market leaders. This came with the added advantage of a knowledgeable staff,

including Susan Noll, LMS Manager, and Jim Macek, LMS Technical Specialist, who spearheaded the Allfirst LMS project and have since been integrated into the M&T Bank Corporate Training department.

Following the acquisition, Corporate Training needed to rapidly deliver conversion training to 5,000 former Allfirst employees located throughout

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Maryland, Delaware, Pennsylvania, and Washington D.C. in order to educate them on M&T products, procedures, and systems. In addition to the Allfirst offices being geographically dispersed, the team was challenged with bandwidth restrictions (128kbs) in some of its branch locations as well as multiple browsers and applications on user desktops.

▶ THE SUMTOTAL SOLUTION

The logical solution was to leverage the existing LMS at Allfirst and to create Web-based training that would support the conversion training effort. Using the SumTotal Enterprise Suite, M&T quickly created a centralized portal, called "The Learning Center", accessible from employee desktops via the bank's intranet. In a short period of time over 20 WBT courses were developed and delivered to Allfirst employees as a prerequisite to subsequent classroom training. By working closely with M&T Telecommunications and Central Technology teams, a testing process was developed that monitored every course page for bandwidth usage and identified the optimal level of bandwidth so that course delivery would not interfere with other business systems at the bank. Because of SumTotal's Web-based architecture, the variety of browsers used at different branches did not pose a problem. The LMS proved to be the perfect delivery vehicle to reach users spread throughout a four state footprint in the Mid-Atlantic region.

▶ THE RESULTS

The conversion WBTs proved to be useful to many different departments and within three months there were almost 15,000 successful WBT completions. "Employee response was very positive and calls to our internal Help Desk were

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That same year, M&T had to ensure that all 14,000 employees of the newly merged organization completed mandatory compliance training required by the federal government on topics such as the Bank Secrecy and Fair Lending Acts, among others. Confident that the system could be leveraged bank wide, four compliance WBTs were developed and delivered in a staggered rollout to the

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entire employee population. This resulted in another 17,000 training completions in the last quarter of 2003.

In order to measure these successes, Kreiner worked with the bank's Finance department to compare the cost to deliver content by WBT versus classroom. It was determined that over the first two years of use of the SumTotal System (2003-2004), the bank avoided \$4.2 million in overall delivery costs by having a portion of its curricula in WBT or blended format. Time to train with Web-based on average was 50% less than classroom, which significantly reduced participant and trainer time as well as travel costs. On average, the bank could deliver content in WBT format at 39% of the cost to deliver the same content in classroom format. "Even when we looked at our overall WBT and blended curricula, we found that we were delivering it at 51% of the cost to deliver the same content in strictly classroom format," Kreiner reported.

▶ TODAY

"The Learning Center" is recognized as an enterprise wide platform that acts as one central portal for all training events, is customizable to divisional needs and specialties, promotes consistency and quality of training and leverages efficiencies and synergies throughout the bank. Their library of WBTs is upwards of 60 courses and utilization rates remain high. Total WBT completions have gone from 4,000 in 2002 to an anticipated 55,000 in 2005. Similarly, demand for new WBT courses remains very strong for 2006. Kreiner and the bank's Finance group have been able to determine that overall total training participation (class and WBT) has increased 255% since the implementation of the LMS, while cost for training per participant has been reduced by 57%.

To manage "The Learning Center" across the bank in an orderly fashion, Corporate Training has developed standards and procedures for requesting and developing WBTs. Additionally, a LMS Governing Committee was established,

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consisting of user groups (various business units) and support groups (Corporate Training and Technology). The purpose of the LMS Governing Committee is to establish the ground rules for the system's use, leverage its efficiencies, and adhere to the standards and procedures and to recommend future functionality.

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▶ FUTURE PLANS

This winter, the bank will implement an upgraded version of the system, which will be integrated with other major bank systems, allowing for expanded administrative functions and the introduction of new user features. To encourage continued high utilization and shorten the learning curve for so many employees, M&T will start by implementing only the basic learner and manager functions offered by the system, such as the course catalog, registration/approval/confirmation, online class evaluations, and training transcripts. "Additional features and capabilities will be added over time as employees become more comfortable working with the system," Susan Noll explained. "Having a robust feature set allows us to make a smooth transition as the users grow more sophisticated."

With the SumTotal solution, the small Corporate Training department, working closely with the bank's technology team, was able to learn and master content creation and deployment within the requirements of the bank's technical infrastructure. The bank's bandwidth has since been increased which creates an ideal environment to expand the use and functionality of the LMS, to reap additional returns of the system, and to increase the effectiveness of training.

For more information, please contact us at +1 650 934 9500, or toll-free at +1 866 768 6825, or via email at sales@sumtotalsystems.com.

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