



ComplianceEase discovers the competitive edge of LMS365

# LMS365 supports the training needs of ComplianceEase

## Challenge

- ComplianceEase had no prior experience delivering formalized employee training programs or leveraging learning management systems (LMSs). However, in 2014 the company needed to create a learning environment for security and privacy-related training to best meet emerging vendor management requirements placed on its regulated financial institution customers. ComplianceEase began looking for an LMS that would not only manage and deliver training to personnel on- and offsite, but also be cost-effective and allow room for growth.

## Solution

- ComplianceEase decision-makers conducted extensive research to determine what their options were but were daunted by the costs of the solutions they reviewed. As a result, these LMSs were not significantly more cost-effective than building and managing a training program in-house. The company went back to searching for a system that could leverage existing technology infrastructure, which led them to LMS365 - the LMS that could seamlessly be integrated in the Microsoft Office 365 environment.

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*They've made a commitment to keep improving LMS365. We've seen that and it validates the investment that we've made.”*

Frank Tuttle, Senior Vice President of Technology

## Results

- In August 2014 ComplianceEase implemented LMS365 after a thorough selection, trial, and beta process. The company found LMS365 to be the best fit in general.
- In terms of total cost, LMS365 ranked number one compared to other LMSs the company reviewed, while at the same time ticking off all the required features and functions such as: ability to deliver content, track, test, confirm, multiple courseware presentation formats including SCORM and AICC, and auditable course assignment and completion status. It perfectly suited their needs to deliver required training to any employee - anytime, anywhere.
- Soon, they established webinar and online courses on security, privacy, and compliance, as well as internal training for employees and managers, with each

group designated their own specific learning path. The increased amount of content has brought on a new focus: *"We have learned to pay more attention to maintaining a positive balance between training that is a chore, and training that is more inspiring among the learners. There must be room for flexibility between courses to encourage engagement,"* says Frank Tuttle, Senior Vice President of Technology at ComplianceEase.

ComplianceEase has experienced a continuous development of the LMS365 platform with new functions and a steady stream of enhancements. *"Our needs will change over time since we're in the business of compliance and there are increasing regulatory demands placed on our financial institution customers, but we are confident LMS365 can seamlessly grow with us,"* says Frank Tuttle and adds: *"Even with these continuous improvements, LMS365 has maintained the same high standard for reliability, usability, and bug-free code".*

## Future

In the future, Frank Tuttle expects tighter consumer finance regulations and privacy protection within the financial services industry, which requires that vendors like ComplianceEase place additional focus on privacy and security training, as well as skill and competency development. This is leading ComplianceEase to:

- Increase mandatory training to help staff retain required knowledge and skills.
- Develop training courses to help employees prioritize the right controls while still performing efficiently.
- Enable flexibility in the individual learner's training, while promoting accountability.

Frank Tuttle foresees long-term benefits of leveraging LMS365 to deliver training within the highly regulated financial services sector. Because of LMS365's rich set of functions, features, options, ease of use, reliability, control, and monitoring, the platform continues to provide a significant return on investment. The quantity and topics of ComplianceEase's classes have increased over time, which is a testament to the fact that this platform has become the company's go-to for education, training, and development. Frank Tuttle adds: *"We couldn't have found a better partner than LMS365. We are so pleased."*

## About

ComplianceEase® is a leading provider of risk management solutions to the financial services industry. The company's products include ComplianceAnalyzer®, the mortgage industry's most adopted technology solution for automated compliance, serving over 400 satisfied institutional clients.



### QUICK FACTS

Industry // Financial Services

HQ (global) // California, USA

Established // 2001

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