

CASE STUDY

How CSI saved time building more impactful, scalable compliance training with Docebo



"With Docebo, we've transformed how we track and measure training effectiveness. It's been a game-changer for how we develop our training programs and has made our training so much more impactful, helping us and our customers stay compliant."

Katie Dyer

Manager, Training Logistics
CSI

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RESULTS

50%+

reduction in manual admin tasks

2x

faster training optimization cycles

1,000+

employees and 500 client banks
(24,000+ individual bankers)
trained

100%

consolidation of reporting
systems

SOLUTION

The Docebo Learning Platform

- A single LMS for all training needs
- Customizable and user-friendly
- Easily scalable
- Analytics dashboard for actionable insights

Advanced Analytics

- Advanced features like automated integration
- Learner feedback
- Real-time reporting
- Learning data integrated with various data sources

Customer

CSI

For over 60 years, CSI has partnered with community and regional banks of all sizes, delivering the latest technology to help them remain compliant and compete with today's largest institutions.

Katie Dyer is the Manager of Training Logistics at CSI. She is quoted throughout this story.

Challenge

EFFICIENTLY SCALING COMPLIANCE AND PRODUCT TRAINING

Community banks are a critical part of the economy, and CSI is on a mission to support that community. Through its modern software and open technologies, CSI ensures the banker experience and every interaction between consumers and their banks are seamless and secure.

Delivering on that promise has led to consistent growth, but that growth also presented a challenge. Manager of Training Logistics Katie Dyer recognized CSI juggled multiple platforms to deliver product and compliance training to both banking clients and more than 1,300 CSI employees. Working across these systems was inefficient, cumbersome, and time-consuming. As the organization grew, things only got more challenging and complex.

Tracking and reporting on training effectiveness was nearly impossible, as the reporting itself was limited. Potential clients always ask, "What's the ROI on your training program?" But Katie didn't have the quantifiable metrics to offer a definitive answer or the actionable insights to chart a clear path forward.

With a growing customer and employee base, CSI needed to find a way to effectively build and grow programs at scale.

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“My reporting was just an absolute nightmare. I was trying to consolidate reports from many different systems and I spent half a day just taking all those reports, reformatting them, and then consolidating them.”

Solution

SCALABLE TRAINING AND ADVANCED REPORTING IN A SINGLE PACKAGE

CSI didn't need to add yet another learning platform to its tech stack. Instead, they needed a unified solution that could efficiently scale, ease the administrative burden, and unambiguously prove training effectiveness.

CSI found that solution in the Docebo Learn platform, combined with the Advanced Analytics pack.

CSI was attracted to Docebo's easy scalability, which made it a good fit for training internal and client employees. Docebo Learn is also extremely customizable without being overwhelming. This customization meant CSI could build the exact training program they wanted and replicate it for customers, instead of reinventing the wheel every time.

The ability to consolidate training and reporting into one user-friendly platform made the choice a no-brainer. Katie, a self-described data junkie, found all the information she desired from Docebo's analytics and learner feedback modules.

By leveraging Advanced Analytics capabilities, CSI can now integrate their learning data with other key systems, like their CRM, Power BI, and Smartsheet, unlocking real-time reporting and actionable insights across the business.

Thanks to the Snowflake technology powering Docebo's backend, the integration was completed in just minutes. Snowflake enables instant, automatic scaling of compute resources, ensuring consistently high performance for any workload, without downtime or manual intervention. It also

supports seamless, secure data sharing across organizations without the need for data duplication, empowering CSI with real-time access and the cross-functional collaboration needed to make smarter, faster decisions.

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Docebo's reporting is superior to any other platform we looked at. You have more ad hoc reporting, more insights, and more fields just out of the box. When you add the ability to integrate data from your other systems on top of that, it becomes a powerhouse.”



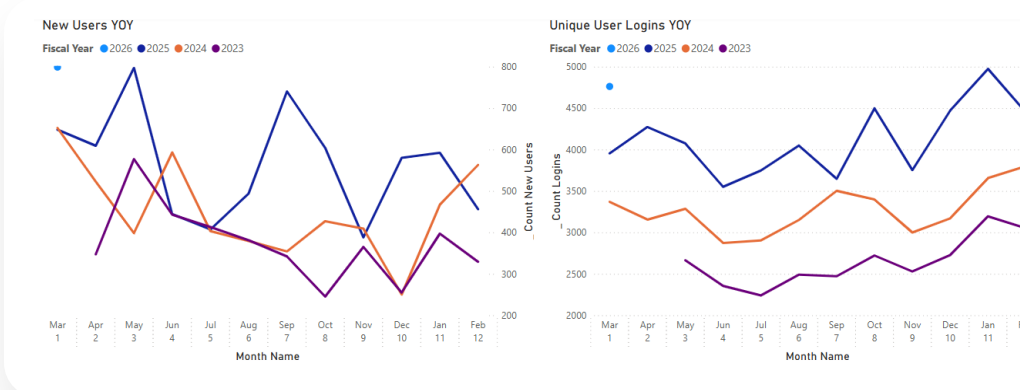
Result

PROVEN, OPTIMIZED COMPLIANCE TRAINING

In Docebo, CSI found the all-in-one training and reporting solution capable of meeting the needs of its growing client base and workforce. By moving from multiple tools to one centralized solution, Katie can now instantly generate precise compliance reports, ensuring CSI clients and employees meet regulatory requirements.

CSI deployed real-time training dashboards across three departments, boosting efficiency and visibility. The implementations team, for example, closely follows new clients' progress through certification and onboarding and can note trends in logins, new customers, and new learners added to the system. Having this information readily available saves the Implementation team about 52 hours a week, compared to having to export reports into Excel and then try to locate what they needed.

Katie's team no longer has to respond to data requests, which saves them at least an hour a week. The team can also follow course usage alongside data like how long they have been a customer and how many support cases they have opened. A new dashboard is on the way for the training team and relationship managers, allowing them to correlate the data and reach out to banks with training suggestions.



Where Katie used to spend most of a day compiling data from various sources, Advanced Analytics now automatically feeds that information into customized reports. They've reduced their administrative burden by more than 50%, which frees Katie and the rest of the CSI L&D team to be proactive and focus on strategic initiatives.

Actionable insights and analytics have helped CSI make better decisions to optimize its training programs. With more real-time feedback and usage data, their training optimization cycles are now 2x faster, and their new analytics capabilities enable the company to prove the value of its training program and quickly identify new opportunities. By identifying underutilized training material, for example, Katie's team realized they could roll those resources into other content.

With Learning Evaluation data now integrated alongside other key data points, CSI can also incorporate course feedback to pinpoint areas for improvement and drive even greater engagement. Additionally, after identifying consistent attendance dips in July and November, the team has strategically dedicated those months to content development and course enhancements.

Thanks to the automated integration, part of Docebo's Advanced Analytics, the CSI team can even compare attendance vs. registration for live events to identify which programs attract the most participation. This information drives decisions about the upcoming training calendar and offerings, so they can offer more popular courses and scale back or remove underperforming sessions. They will soon be adding Learning Impact Data to reporting, which will further influence training decisions.

The result? High-impact, high-value training programs and increased efficiency. CSI decided to pass on the benefits by delivering their foundational Banking 101 suite at no extra cost to customers.

In addition to the customizable yet accessible platform that can fit any need, CSI has developed a great partnership with Docebo. Whatever new challenges CSI encounters, the Docebo platform and team are ready to provide solutions.

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“My experience working with the team at Docebo is the gold standard for what a customer relationship should be. They are truly a partner. They listen to what we need and help us find solutions. They’ve been amazing to work with.”



Unlock the power of
data-driven decisions.

Try Docebo today.

Schedule a Demo