



Citadel Credit Union Partners With MadCap Software to Enhance Member Experience



Enhanced
Member Experience

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INDUSTRY Financial, Banking Services
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Citadel, a not-for-profit, member-owned financial institution, is one of the Greater Philadelphia area's largest credit unions, providing banking, investments, and insurance services to more than 220,000 members. With over \$4.5 billion in assets, it was recognized as a Forbes 2021 Best-in-State Credit Union, and it has been named one of the best performing credit unions in the nation by SNL Financial.

Citadel maintains six online documentation portals for different groups within the credit union, which contain information about its financial products and any associated policies and procedures. Using the MadCap Authoring and Management System (AMS) from MadCap Software to deliver this documentation, Citadel has been able to maintain its high level of service even during operational adjustments due to the pandemic.

Citadel moved from older authoring software to MadCap AMS, which offers a complete solution supporting the entire content development lifecycle. MadCap AMS capabilities include MadCap Flare for single-source authoring and publishing; MadCap Central for cloud-based content collaboration, project management, analytics and more; and MadCap Capture for image capture and editing.

GOALS

- Enhance customer service by enabling Citadel's employees to get the information they need to assist customers faster.
- Facilitate collaboration with SMEs within the credit union's different departments.
- Streamline the delivery of Citadel's six documentation portals.
- Replace Adobe® RoboHelp® with a modern authoring and content management solution.

SOLUTIONS

- MadCap Flare native XML single-source, multi-channel content authoring software
- MadCap Central for content management, collaboration and analytics
- MadCap Capture for image capture and editing

BENEFITS

- **Improved Customer Support:** Elasticsearch, micro content and drop-down text in MadCap Flare-based web documentation plus images from MadCap Capture enable employees to find the information they need to assist customers faster. Usage analytics in MadCap Central help Citadel to further optimize search results.
- **Easier Collaboration:** Cloud-based collaboration with MadCap Central has reduced the average time to incorporate updates and edits from Citadel's SMEs.
- **Streamlined Content Delivery:** Topic-based authoring, snippets, variables, and stylesheets speed updates to Citadel's six documentation portals.
- **Modern Content Management System:** The move to the MadCap Software AMS System from Adobe® RoboHelp® has added significant functionality for content creation updates, collaboration and analysis while minimizing the demands on Citadel's computing resources.

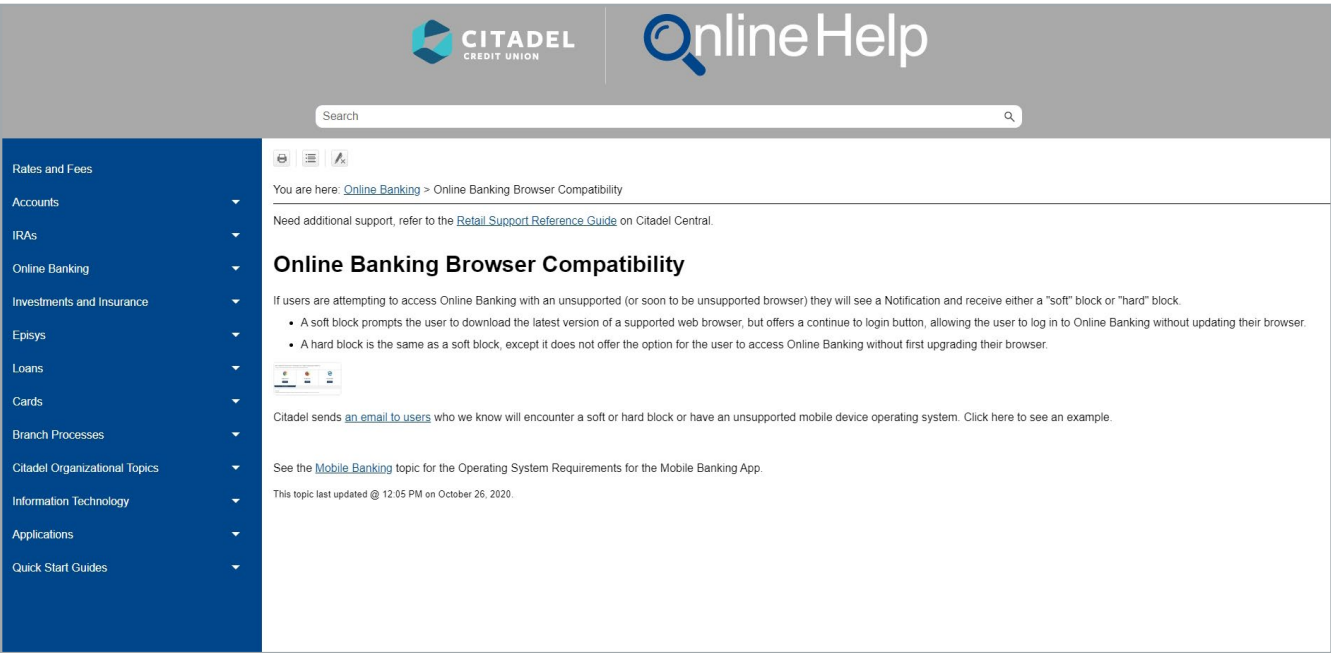
Challenge: Finding Critical Information

With the previous software, Citadel found it difficult to use, and employees could not easily find critical information they rely on every day to do their jobs.

The door opened to reevaluate the credit union’s authoring software when new Learning & Leadership Development Director Justin Schakelman joined Citadel, and the team shared the challenges it faced with their current system.

“We explained to him that we faced consistent challenges because employees could never find the information they needed,” Citadel Instructional Designer and Learning Systems Support Lead Michelle Malick noted. With Schakelman’s approval, “we went on a search for a new platform, and MadCap Software emerged as the industry leader.”

Citadel now delivers six different documentation web portals using MadCap Flare. The primary one, which is used by most employees, contains topics about processes for the credit union’s core system; information on products, such as savings accounts, checking accounts, certificates, mortgages, and other financial services; and any associated policies or procedures. The other five portals cover processes and procedures for other departments.



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It’s been so much better since we brought the Flare-based documentation portals online,” Michelle says. “We went from daily challenges to seamless operations.

MICHELLE MALICK
Instructional Designer and Learning Systems Support | Citadel Credit Union

Online Documentation Helps Maintain Business Continuity

The MadCap Flare-based documentation portals were first launched in January 2020. Just two months later the pandemic hit, and Citadel had to close its branch lobbies, only keeping its drive-ups open.

“All of our branch office employees would show up to work, but they weren’t permitted to open the doors to let customers in. Instead, employees were getting on the phones to service customer needs. Processes they typically did in the branch would sometimes be completely different from what they would do over the phone,” Malick recalled. “As you can imagine, being able to get into our Flare-based documentation portals and see the correct processes was very important.”

Meanwhile, Citadel’s entire contact center team—known as Member Care—was also required to work from home, along with some employees on other teams. These employees had to access the credit union’s systems, including MadCap AMS, from home using a work computer connected to a virtual private network (VPN).



With access to Flare-based online documentation, our employees working from home could continue to do business as usual working remotely. Having Flare has been critical for our business continuity.

MICHELLE MALICK
Instructional Designer and Learning Systems Support | Citadel Credit Union

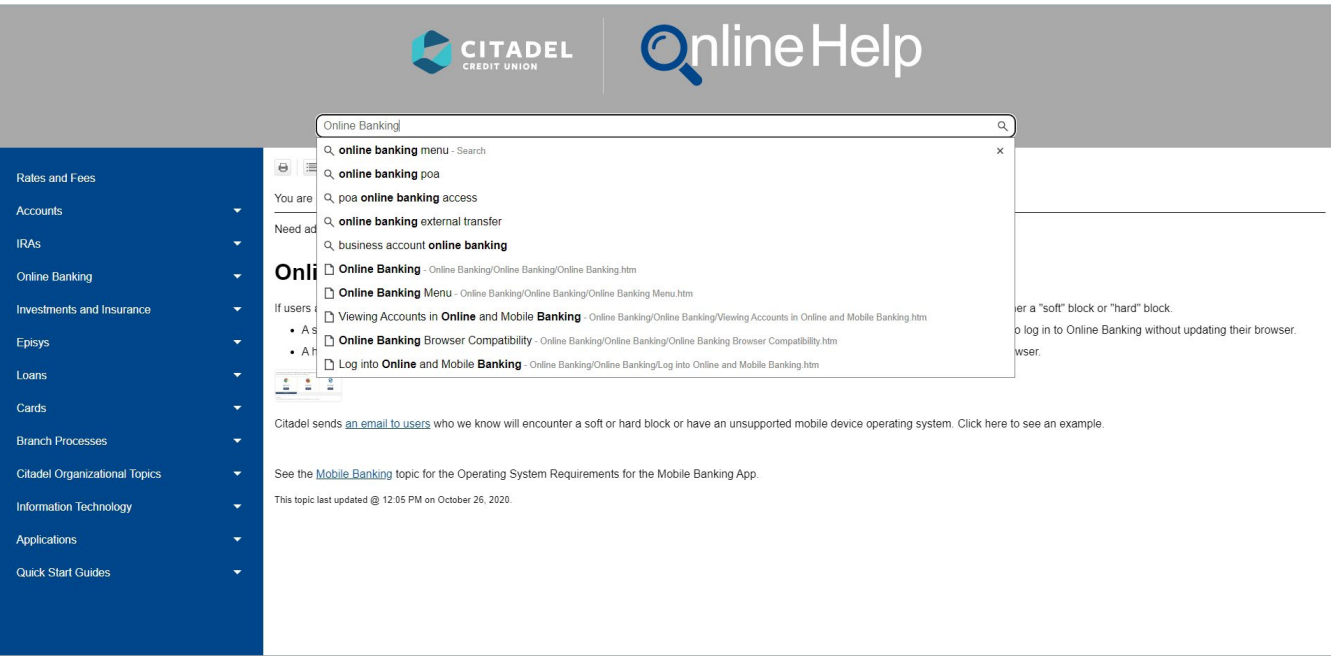
Micro Content and Search Put Answers at Employees’ Fingertips

The six HTML5-based documentation portals provide side navigation, which employees prefer over top navigation. However, in practice, most users go directly to search because the Elasticsearch functionality in MadCap Flare makes it fast and easy for them to find the information they need.

“Elasticsearch in Flare is a real game changer,” said Malick. “Just being able to give our users that predictive search is great. They love how it acts more like if they’re searching on the web.”

More recently, Citadel has started using MadCap Flare to add micro content for employees who need quick answers and do not need all the details.

“The micro content enabled by Flare has been a huge help for our contact center,” Malick said. “A lot of times they don’t need every single detail to answer a customer’s question; they just need some highlights. Adding in micro content has been very helpful in allowing them to respond to customers quickly.”



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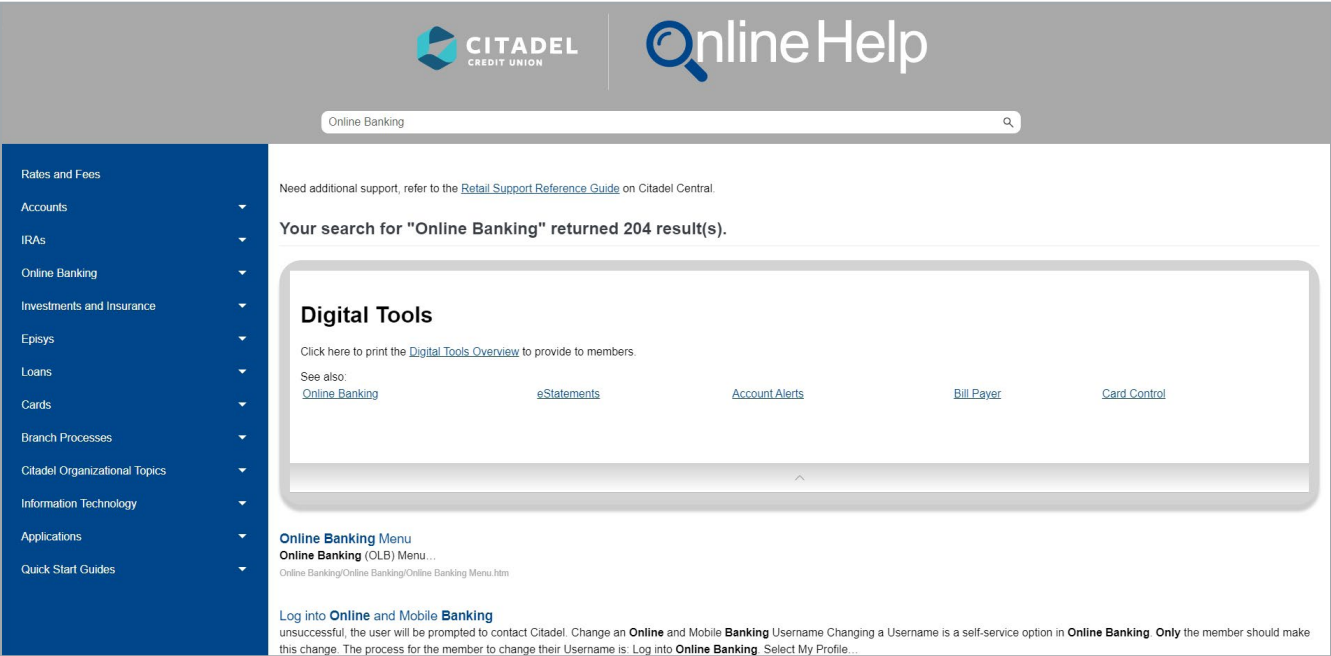
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Micro content improves search and provides users with highly relevant information based on search queries. Drop-down text and the table of contents (TOC) functionality in MadCap Flare also helps users to navigate the documentation portals.

“Our retail staff likes being able to have everything about a particular product on one page. They really love the drop-down text feature in Flare that allows them to expand only the topics they want to read,” said Malick.

Additionally, Citadel enhances its MadCap Flare-based documentation with images created using the tightly integrated functionality of MadCap Capture.



Micro content allows the Citadel team to add links and snippets of information relevant to the user’s search query.

“I love the ability to right-click an image and put it into MadCap Capture, where I adjust the image before adding it to our Flare-based documentation,” said Malick. “That has been a huge time saver.”

MadCap Central for Analysis and Collaboration

With an eye toward continually improving employees’ documentation portal experiences, Citadel relies on the usage analytics capabilities in MadCap Central.

“I mostly use MadCap Central’s analytics to understand what users are searching for but aren’t getting any results. This allows me to figure out a way to put in the proper result, so they can get the information they need,” she explained.

For example, MadCap Central’s analytics brought attention to the fact that many employees are not sure who to contact if a customer needs help with translation. With those insights, Citadel was able to document the process for finding someone in the organization who can assist.

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Citadel also takes advantage of MadCap Central for collaboration with subject matter experts (SMEs) and version control. All MadCap Flare-based content is stored in MadCap Central. As a result, the Flare admins can download a MadCap Flare-based topic to MadCap Central where SMEs can go in, review it, and make changes. The topic is then uploaded back into the portal.

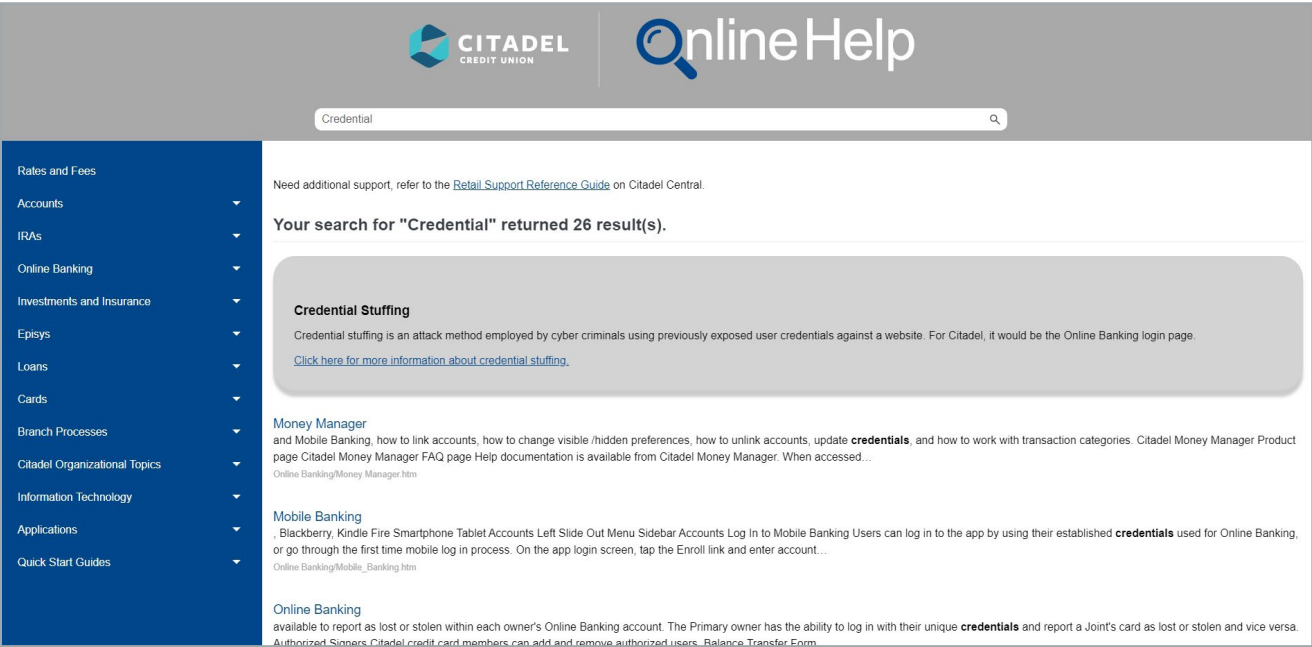
“We have one department that has instruction updates almost daily,” Malick observed. “With MadCap Central, I can download the current instructions to them, they can make their own updates, and then I upload the changes into Madcap Flare. They like being able to revise the instructions themselves, making it a real time-saver.”

MadCap Flare for Maximizing Authors’ Efficiency

Citadel also relies on several features in MadCap Flare to optimize the efficiency of the credit union’s authors. Two of the most widely used features are snippets and variables.

“I love snippets for reusing content and having the option to use variables in Flare. If a process calls for a certain person to be contacted, and that person changes, I can just update the name in one place versus having to go through the entire online documentation,” Malick explained.

Citadel also uses style sheets in MadCap Flare to set up a new topic quickly and ensure that it is consistent with other topics. Additionally, it uses the external resources feature in MadCap Flare, making document uploads to Madcap Flare simple.



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Other efficiencies gained with MadCap Flare include faster publishing and lower computing power requirements. Malick said “the previous software would take an hour or more to publish. In Madcap Flare, it takes no more than five minutes.”

Finally, documentation and support from MadCap Software have helped to facilitate the implementation of Citadel’s six documentation portals.



I really love MadCap Software’s documentation, and every time I call the support team, they have been so helpful. I attend many of the webinars and learn something new every time.

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“I really love MadCap Software’s documentation. Every time I call the support team, they have been so helpful. I attend many of the webinars and learn something new every time. It’s all so much better than what we had access to before,” Malick recalls. “Change can be scary sometimes, but the move to MadCap Software has been a great experience.”



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