

# JPMORGAN CHASE & CO.

“Integration with SumTotal Learn was a very important feature for us. Course developers can now be assured that any courses created and published will be fully compatible with the LMS – in terms of setup, running the course, and tracking the results.”

**William Loucks, e-learning technology manager, Chase Card Services**

## Business Challenge

JPMorgan Chase (NYSE: JPM) is one of the oldest financial institutions in the United States. Chase’s performance improvement team is responsible for training the card services department. When the department began to experience rapid growth, the team quickly realized it would need a new solution to continue meeting its training objectives.

The team wanted a comprehensive tool that would take care of its content-authoring needs, reduce overall training time, yet continue to keep employee knowledge current with changing requirements. The platform needed to integrate with the company’s LMS, SumTotal Learn and be technically compatible with a wide variety of desktops across different departments, at multiple sites.

## How SumTotal® Helped

Chase opted for SumTotal Learn: ToolBook. This solution enabled a team of subject matter experts to create media-rich online courses that incorporated text, graphics, audio, simulations and extended assessments.

Toolbook offers complete integration with the company’s LMS, meaning course completion was easily tracked. ToolBook has the added benefit of facilitating the use of assessment tools and question widgets that are fully integrated with the LMS. This allowed the eLearning team to embed full-fledged assessments throughout and at the end of online courses. The out-of-the-box capability to track question level details in an assessment enabled the team to identify any existing knowledge gaps.

## Key Metrics

**300k+**

300,000+ compliance computer-based training online completions and assessments each year, with over a million completed.

**1k**

1,000 courses offered to employees at their desktops

All compliance training scored and tracked

## About JPMorgan Chase & Co.

JPMorgan Chase (NYSE: JPM) is one of the oldest financial institutions in the United States. With a history dating over 200 years, today Chase is a leading global financial services firm with assets of \$2.4 trillion. They operate in more than 60 countries and have over 240,000 employees. Chase serves millions of consumers, small businesses and many of the world’s most prominent corporate, institutional and government clients. They are a leader in investment banking, financial services for consumers and small businesses, commercial banking, financial transaction processing and asset management. Their stock is a component of the Dow Jones Industrial Average.

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