

# USAA

## CASE STUDY

CUSTOMIZED ONSITE COURSES FOR TWO DIVISIONS  
AND A SUBSIDIARY

### INDUSTRY

Insurance and Financial Services

### SIZE

USAA provides insurance, banking, investments, retirement products and advice to more than 11 million members. Known for its legendary commitment to members, USAA is consistently recognized for outstanding service, financial strength, and employee well-being.

USAA was founded in 1922 and has 33,000 employees globally and 12 campuses in 6 cities in the U. S. It is headquartered in San Antonio, Texas.

### PROBLEM

Initially, USAA contacted Instructional Solutions to provide bedrock business writing skills to their Procurement Group. The Procurement Group negotiates with outside vendors and contractors. Procurement employees write contracts, summarize recommendations, and support project development. USAA wanted to improve the efficiency and effectiveness of this group's business writing, and ensure writing tonally reflected USAA's mission.

### SOLUTIONS

Multiple courses were developed as the training expanded from the Procurement Group to all of the Enterprise Intelligence Division and then to a USAA Subsidiary.

The initial training to the Procurement Group was an onsite customized course based on Instructional Solution's [Effective Business Writing Techniques](#) course. The training was so successful that two additional courses were offered to Procurement employees: [Executive Summary Writing](#) and [Managing Information Overload](#).

### HIGHLIGHTS

# 100%

Participants found the instructor "very helpful" or "helpful."

# 100%

Participants found the writing exercises and documents "very helpful" or "helpful."

# 100%

Participants identified their writing skills as stronger after training.



## **SOLUTIONS CONTINUED**

A year later, these courses were offered to all employees in the Enterprise Intelligence Division. Hundreds of employees were trained across a three-year engagement.

Writing requirements at USAA are sophisticated. Employees convey complex information, often synthesize information to recommend solutions, present highly technical financial information, need to persuade and foster connection with colleagues, vendors, and members, and also they need to write with the earnest and professional voice that represents the mission of USAA.

Again in 2018, USAA's subsidiary company, USAA Real Estate, contracted Instructional Solutions to present similar training to three segmented groups: managers, senior managers, and senior leadership. The training for managers and senior managers was similar to the training offered for USAA Enterprise Intelligence. The training for senior leadership was a new customized course that focused on persuasive and leadership writing.



## **EVALUATION HIGHLIGHTS**

**The wide expansion of the training and recommendation to offer this training to other areas of USAA is the strongest recommendation that the training was effective.**

Prior to training, participants rated their business writing skills as:

- ▶ beginner 0%
- ▶ adequate 73.91%
- ▶ had major skill 26.09%
- ▶ expert 0%

After training, participants rated their business writing skills as:

- ▶ beginner 0%
- ▶ adequate 0%
- ▶ had major skill 82.61%
- ▶ expert 17.39%

***“ The instructor is very knowledgeable! I took the Effective Writing course previously, and this helped a lot with base skills. I recommend that course as pre-requisite for all employees. ”***

**[Click here for full evaluation.](#)**