







DEPARTMENT OF SAVINGS AND MORTGAGE LENDING

-  9 months of membership to date
-  Approximately 60 users (98% adoption rate)
-  3,186 videos watched
-  31x ROI

About the Texas Department of Savings and Mortgage Lending

This State Agency was established in 1961 under the jurisdiction of the Finance Commission to promote and protect a healthy mortgage lending environment in Texas.

The Challenge

In 2021, The Department of Savings and Mortgage Lending in the State of Texas was planning a move to Microsoft 365.

From the early planning stages, training was identified as an important part of the migration. Realizing that the transition to Office 365 is not just a one-time event, they wanted their users to have training resources easily and continuously available to help with a smoother transition.

The Solution

They found KnowledgeWave through a Google search. The Tier 2 KnowledgeWave Membership was a good fit for them because it was well within their budget for about 60 users, and they wanted immediate online training, as well as ongoing training.

A KnowledgeWave subscription provides live, scheduled webinars each month as well as on-demand videos that can be watched anytime. Their KnowledgeWave account manager customized their learning dashboard to promote the most relevant training for their users migrating to Microsoft 365 and starting to use cloud-based tools like Microsoft Teams and OneDrive.

365 is new to all of us in the agency, Teams especially. Often users ask the IT division how to do this or that in a specific program. We don't know ourselves so having a resource like KnowledgeWave is very beneficial.

A private webinar on Getting Started with Microsoft Teams was scheduled prior to the roll-out so that users could hit the ground running. This webinar was tailored to fit their needs, for example, some of the commercial Teams apps are not available in a government tenant, so that section was omitted from the training. A recording of the custom webinar is also available on their KnowledgeWave learning dashboard so that users can review, or anybody who missed the live event can still benefit from it.

Even now, 9 months into their KnowledgeWave subscription, the ongoing value is there. Users are still watching videos and attending occasional live webinars on Teams, SharePoint, Excel, PowerPoint, OneNote and various professional development topics to keep their skills sharp and improve efficiency with Microsoft 365.

KnowledgeWave Learning Site

- On-demand video training library
- Monthly training webinars
- License video content for external LMS

Private Training

- Custom webinars
- Custom webinar recordings added to video training library
- Leadership workshop (Microsoft 365 focus)
- One-on-one user coaching
- Remote open lab sessions

We finally migrated to O365 so there was a push in recent weeks to inform our users by email to take related training to prepare for it.