TEXAS FARM CREDIT

Texas Farm Credit Uses Zavanta® Software to Transform Knowledge Sharing and Compliance

COMPROSE™

Our Client

Texas Farm Credit

Texas Farm Credit is a financial lender serving the agricultural and rural communities of Texas. As part of the nationwide Farm Credit System, Texas Farm Credit provides a wide range of financial services tailored to meet the unique needs of farmers, ranchers, and rural homeowners. Their mission is to support rural communities and agriculture with reliable, consistent credit and financial services, helping to ensure the sustainability and growth of Texas's vital agricultural sector.

Business Challenge

In the past, managing policies and procedures often relied on old-school, manual systems that were complicated. Jennifer Correa, Business Resource Specialist, shared, "You had one person in charge of keeping up with the calendar reminders for expiring documents, you had multiple people being emailed, and at the end of the day there was no way to easily find the information you needed." The scattered nature of this approach made it challenging to keep track of important information, resulting in frustration and inefficiency.

The need for increased accessibility became clear as Texas Farm Credit struggled with the limitations of these manual processes. With no centralized system, finding necessary documents was a time-consuming task, sometimes leaving employees struggling to locate the information they needed.

There was an urgent need for a more streamlined and accessible solution, driving the move towards digital policy and procedure management tools that could better support organizational needs.

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The Solution: Zavanta Software

In the process of finding a solution to better manage policies and procedures, it became clear that any solution had to address key pain points such as the difficulty in keeping documents current and the challenge of finding critical information quickly, as well as meet the requirements of compliance.

In these conversations, Zavanta was discovered to be the solution that fit their needs.

Three standout features captured their attention during the evaluation process.

Automation: First, the automation functionality was a game-changer, ensuring that policies and procedures remained up to date without manual oversight. This eliminated the risk of outdated documents slipping through the cracks.

Search: Second, the platform's outstanding search function allowed users to locate relevant documents in seconds, saving significant time and reducing frustration.

Work Instructions: Finally, the work instruction feature added another layer of utility by providing step-by-step guidance to employees in all locations, further enhancing clarity and reducing errors in everyday tasks.

After identifying these key benefits, and with strong support from senior leadership, Texas Farm Credit decided to roll out Zavanta association wide.

"This system is so powerful and flexible, I'm just blown away. I love it."

- JENNIFER CORREA
Business Resource Specialist

The Results with Zavanta

By standardizing the way policies and procedures were managed and accessed with Zavanta, the entire organization benefited from improved compliance and consistency, leading to enhanced engagement, efficiency, and overall operational effectiveness.

Results include:

- Confirmed understanding with Read Verify
- Enhanced accessibility
- Effective onboarding
- Consistent work across multiple locations
- Increased compliance

Confirmed Understanding with Read Verify

As part of the rollout strategy, Texas Farm Credit introduced the Zavanta portal to all employees through a Read Verify campaign with the Employee Handbook. By requiring employees to confirm that they had reviewed the material, they were able to track engagement and ensure that everyone logged in and understood how to use the new system.

Following the success of the Employee Handbook rollout, they expanded the Read Verify process to include the Social Media Policy, ensuring that all team members were aware of the organization's guidelines for an online presence.

The positive feedback and engagement from these rollouts have prompted the Credit Department to request an additional test for their own policies, showcasing the growing interest in using Zavanta to improve accountability and compliance across various departments.

"Their positive attitude, hard work, and persistence made them a fantastic group to work with. I was particularly impressed by their communication and change management strategy leading up to the launch. Their execution was spot-on and ensured the implementation was a success!"

- DAN SPILLER
Partner Success Manager, Comprose

Enhanced Accessibility

"My number one favorite feature is the search engine Zavanta has implemented. Not only is it incredibly fast at finding the keyword in your documents, but it delivers results that make sense for what you searched. This tool makes finding the information you are looking for at the moment very easy to get to," Jennifer shared.

With advanced search filters, employees can refine results by keywords, categories, or tags, ensuring they find the exact information they need in a matter of seconds. This saves time and improves accessibility, as users can instantly access relevant content.

Effective Onboarding

Texas Farm Credit's "Onboarding" section is something they never had before Zavanta. This has been a tremendous addition in that it allows a personal welcome to new employees. New employees are introduced to their onboarding team, ensuring they have the right contacts for guidance. They also include a warm welcome message from senior leadership, reinforcing the commitment to their success from the start.
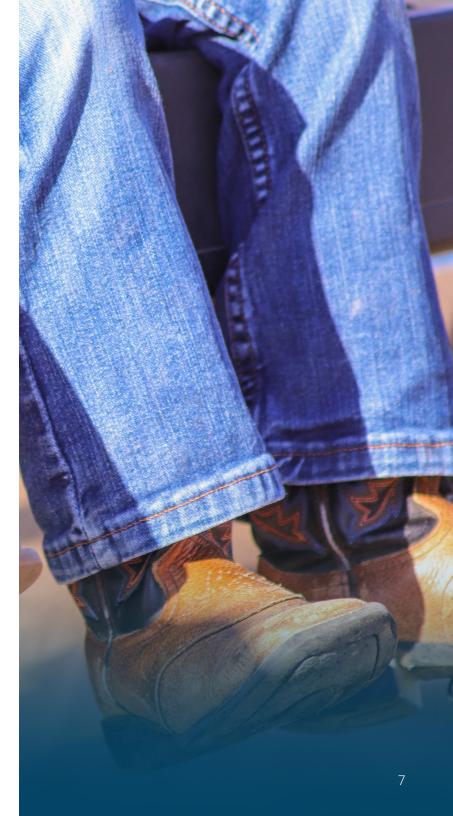
New employees are also given their onboarding schedule to set expectations for their first few weeks in their position. Alongside this, the Zavanta portal offers a single source of truth with a range of helpful resources to assist them in acclimating to their new role, making the transition smoother and more organized.

Consistent Work Across Multiple Locations

One of the most impactful changes Zavanta has brought to the business is the use of job aids and work instructions to improve consistency.

Before Zavanta, employees often had to rely on colleagues for guidance, which led to inconsistent practices across different offices. For example, an office in Tyler might handle a process differently than one in San Antonio. With Zavanta, there is now a single, official resource for job-related instructions, ensuring consistency across the entire association, whether an employee has been with the organization for ten years or just ten minutes.

Named "Employee Center: Your Knowledge Supercenter," Texas Farm Credit employees from every location now have a single source of truth for the information they need to complete a job.

Increased Compliance

All documents are logged in Zavanta, covering everything from Standards of Conduct and the Whistleblower Program for the legal team to IT Security and Data Privacy Standards for the technology department.

One of the standout features is the ability to link related documents, which has proven particularly useful for working instructions and job aids. This interconnected system creates a seamless "spiderweb" effect, allowing users to navigate between related documents effortlessly, ensuring they find the information they need without disruption. For example, an HR work instruction on how to submit a timesheet can also be linked to documents highlighting annual leave, volunteer hours, and sick leave.

Additionally, the workflows in Zavanta help maintain up-to-date information, ensuring that all materials remain current and relevant. This is achieved through automated reminders to regularly review and update documents, alerting users to any changes or expirations. By confirming current and accurate information, Zavanta helps prevent compliance gaps that could arise from outdated policies or procedures.

Why Zavanta?

"Zavanta has helped transform our association by putting knowledge at our fingertips. With its intuitive policy and procedure management system, we've streamlined operations and empowered our teams to access critical information instantly.

It's not just a tool; it's essential for onboarding new employees, sharing critical process changes, and ensuring we stay efficient and operate at our best every day.

In a very short time, our teams have come to rely on Zavanta in ways we never imagined. Our employees love it, and we love how Zavanta has become a critical part of our day-to-day operations."

- JOLENE CURTIS
Chief Operating Officer, Texas Farm Credit

About Comprose

We are dedicated to helping people thrive by gaining access to accurate, updated "how to" knowledge anytime, anyplace, in any language.

Everything we do – our method, our software, our advice – is focused on one thing: helping our clients achieve their strategic goals by getting procedural knowledge out of peoples' heads and shareable.

We're passionate about the power of good systems and clear standard operating procedures because of the tangible results we've seen our customers achieve: agility, reduced operating costs, faster training, predictability, and greater transparency.