



### Fairway Independent Mortgage Corporation

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## Fairway Independent Mortgage increases flexibility and scope of employee training with GoToTraining

Fairway Independent Mortgage Corporation, based in Sun Prairie, WI, is a private, nationwide mortgage lender and mortgage banker with more than 100 branches and about 1,150 employees. The company focuses on home loans, with some reverse mortgages and commercial lending. Fairway takes pride in its customer service and competitive rates.

### The challenge: keeping pace with increasing demand for training

Since its founding in 1996, Fairway has grown steadily, primarily through acquisition of mortgage originators. Each time a new branch is opened, the staff must be “onboarded” — given an orientation about Fairway’s business processes. One of the most important aspects of onboarding is training employees to use the company’s mission-critical loan origination and mortgage management software suite, Encompass from Ellie Mae. Teresa Cornell, AVP Education & Training coordinator, and her team of four are responsible for this software training, which typically begins with on-site instruction at the branch and is augmented by advanced or specialized training at a later date. “We usually spend a week to 10 days at the branch, depending on its size, to train loan officers, managers, loan processors and closers and other staff in the basics of Encompass,” she explained. “Follow-up training, whether it’s for reinforcement or to teach specialized functionality, is done remotely.”

Before the implementation of Encompass, Cornell and her small staff provided remote software training using one-on-one conference calls. However, as the company grew and demand increased, this system quickly became impractical. Further, phone-based training was awkward because software functionality could not be demonstrated in real time. The enterprise-wide rollout of Encompass — a robust and sophisticated tool — in 2006 made it essential to find a better method. “We implemented GoToWebinar to provide web-based training for large groups,” she said. In addition

to onboarding new locations, the Citrix Online service was used to train corporate staff and existing branches on the new software.

Although webinars were much more effective and efficient than conference calls, Cornell needed a tool specifically designed for web-based training. She wanted to enhance interactivity between instructor and students, administer tests and evaluations, and provide course materials in advance.

## Implementing GoToTraining

Based on Fairway's positive experience with Citrix® GoToWebinar®, the company adopted Citrix® GoToTraining® soon after the new product launched in early 2010. Cornell and her team use it extensively, conducting 5 to 10 classes per week. In addition to follow-up instruction for new branch employees, they provide training on Encompass functions needed to manage new or unfamiliar types of loans, such as adjustable rate mortgages (ARMs). New hires must complete a series of required trainings that are offered monthly or bimonthly, while long-term employees benefit from refresher courses.

### Key benefits

- Enables small training staff to support organizational growth
- Streamlines branch onboarding process
- Provides purpose-built training capabilities
- Delivers intimate, interactive learning experience

In addition, Cornell provides web-based training to individual departments within Fairway, such as underwriting, which use specialized software tools or functionality. "These corporate departments have staff spread across the country, and GoToTraining is ideal for reaching everyone," she said.

Finally, as the company prepares to upgrade to Banker, a more powerful product from Ellie Mae, a "point person" group — comprised of one representative from each branch — is starting to receive web-based training on new features and functions and passing this knowledge on to co-workers.

## Flexible, interactive training supports business growth

"We love GoToTraining. It has all the features and capabilities that we need to deliver high-quality, interactive training on demand to an intimate group," Cornell said. Her favorite features include automation of administrative processes such as sending follow-up emails, the ability to include instructional materials with registration emails and to display them on screen as needed during the training, and the integration of evaluations and tests, which can be administered either during or following the class.

"We like having the option to use chat, which some employees prefer, or to unmute students who 'raise their hands' to speak to the instructor," she noted. "Either way, employees can easily ask questions, which helps them feel connected and creates a relaxed atmosphere."

Another key benefit of the product is the ability to schedule classes on the fly to meet an unexpected need. "For example, when we saw that employees required training on ARMAs, I was able to schedule classes in a few minutes and send out a link to the registration right away. GoToTraining gives us the flexibility to train on demand without all the arrangements needed to set up an on-site visit."

Not only has GoToTraining enhanced individual online training sessions, it also has opened the door to a potential improvement in the onboarding process. Cornell explained, “It’s been our dream to reverse the order of training at new branches — to provide an online introduction to the software first, followed by on-site instruction. We felt that this approach would give the employees a foundation of knowledge so they could ask better questions and learn more quickly once we arrived.

“We got a chance to prove our theory with a branch that opened before we could send people out into the field. We ran GoToTraining sessions first, and it worked great. People already had some familiarity with Encompass, which freed up extra time to do some hands-on work on sample loans and to cover more ground. Now, there is a new branch in New Jersey whose employees are tech savvy and feel very comfortable with web-based training alone. With GoToTraining, the company has the option to skip the on-site portion of software onboarding altogether.”

The benefits of online training will undoubtedly increase as Fairway pursues its growth plans, which include more acquisitions and expansion to 3,000 to 4,000 people. “This is a great time to recruit new branches that are looking for the advantages Fairway can provide,” Cornell said. “Our planned growth, together with the upcoming rollout of Banker, makes GoToTraining extremely beneficial for the business. It allows my small team to support the entire organization with responsive, highly effective training — without getting exhausted. It’s scary to think where we’d be without GoToTraining.”



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