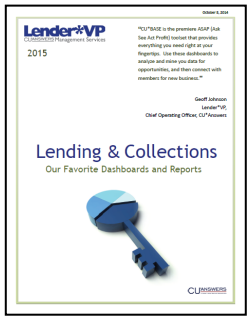
CU*ANSWERS
The Writing Team

Writing Team: Tricks of the Trade

November Top Picks: CEO Strategies Documents

Issue 36

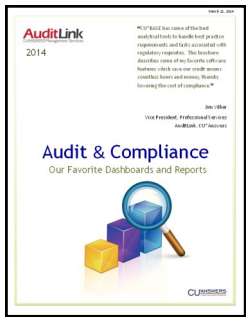
Be sure to attend the upcoming Tricks of the Trade webinar on November 17 from 3:30-4:00 PM ET. Watch for an invitation via email. Learn more about the Top Ten Lending Dashboards and Reports brochure, documents handed out at CEO Strategies, and new Show Me the Steps instructions!



Pick #1: What are the top ten CU*BASE lending dashboards and reports my credit union can use to Ask/See/Act/Profit (ASAP)?

Several months ago we began rolling out the "Top Ten Dashboards" series, beginning with the Auditing issue. At the CEO Strategies Conference, we introduced the second brochure in this series, which includes the top ten lending dashboards and reports according to Geoff Johnson, CU*Answers COO. Geoff has extensive knowledge in the lending area and gives valuable insight into how to use each one to Ask, See, Ask, and Profit (ASAP).

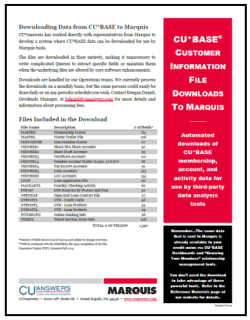
Learn more in the "Lending & Collections - Our Favorite Dashboards and Reports" brochure, which can be found on the My Favorite Dashboards and Reports page.



Pick #2: What are the top ten CU*BASE auditing dashboards and reports my credit union can use to remain in compliance?

We first introduced the "Audit & Compliance - Our Favorite Dashboards and Reports" brochure in the 29th issue of Tricks of the Trade, but since it was included in the CEO Strategies packet, we thought it would be good to highlight it again. This was the first in the "My Favorite Dashboards and Reports" series. For this brochure, Jim Vilker, CU*Answers compliance expert leading the AuditLink team, picked his top ten CU*BASE auditing dashboards and reports to help credit unions remain in compliance. All auditors should put this brochure at the top of their reading list!

Find the "Audit & Compliance - Our Favorite Dashboards and Reports" brochure on the My Favorite Dashboards and Reports page.

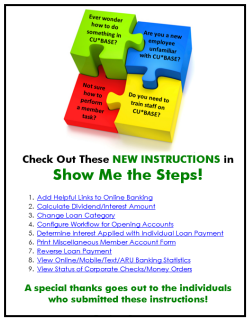


Pick #3: How can I download data from CU*BASE to Marquis tools?

CU*Answers has worked directly with representatives from Marquis to develop a system whereby CU*BASE data can be downloaded for use by Marquis tools. Learn more about this process in the "Downloading Data from CU*BASE to Marquis" brochure. Also refer to the white paper written that debunks common misconceptions about Marquis and core processing software as it relates to CU*BASE.

Pick #4: Why are Social Media Chats important for your credit union?

Find impressive statistics on social media penetration and learn more about Chatter Yak! services in the "Why are Social Media Chats important for your credit union?" brochure.



Pick #5 (Client Choice): How do you find 30 new step-by-step directions on using CU*BASE?

With this issue, we'd like to highlight all the new instructions submitted by clients that have been added to Show Me the Steps online help. In October alone, thirty new directions were added! Be sure to check out Show Me the Steps for all the new directions. Have your own instructions to add? Submit new instructions on the submission page!

Refer to the Tricks of the Trade Newsletter Series page to review previous Tricks of the Trade newsletters!