

Announcement

## NEW CU\*TALK AUDIO RESPONSE TO BE RELEASED ON JULY 12, 2005

As announced to all credit unions during March, we are now ready to roll out the brand new version of CU\*TALK Audio Response to our online credit unions. Beta testing is currently underway, and we've been hearing rave reviews. (We also want to thank all those who offered to be beta-testers—we ended up with many more volunteers than we needed!)

The final cutover date has been set and you can start getting the word out to employees and members. Here are the specifics:

*What is the cutover date?* **Tuesday, July 12, 2005**

*Will there be an interruption to allow for the cutover?* The phone company will move the existing audio response phone lines over to the new system first thing in the morning. This will involve taking the entire audio response system offline for a short time (probably less than 15 minutes) sometime between 7:00 a.m. and 8:00 a.m. EST.

*What phone number will members call?* On July 12, your members will still call the same numbers as before (616-285-5720 or 800-860-5704). See below for information about ordering your own unique 800 number.

*Who will be affected?* Credit unions that do not have their own ARU.

*What differences will members notice?* The new system has been coded to be as much like the existing CU\*TALK system as we could possibly make it. The call flow was designed to match the existing system, the options are the same, and the member experience is nearly identical. Other than a new voice (female this time), the impact on your members should be minimal.

### Should I notify my members now?

If you act quickly, you can take advantage of some generic 4-color statement stuffers we've designed for your June quarterly statements. These include a simple message about the new voice, with a note about using the same access phone number as before.



To include these stuffers in your June statements, **orders must be placed no later than Friday, June 17, by 5:00 p.m. EST.** Contact Melinda Haehnel at [mhaehnel@cuanswers.com](mailto:mhaehnel@cuanswers.com) for pricing and to place your order. (Final pricing will depend on total quantity ordered by all participating credit unions.)

Or you could elect to add some simple verbiage in your June quarterly statement or on your credit union's web site, such as the following:

*This summer our CU\*TALK Audio Response system is getting a facelift....well, maybe we should call it a "voice" lift! Starting on July 12, you will hear a new voice when you call audio response to check on your accounts or make a transfer. Behind the scenes there will be a brand-new system using the latest technology. The same familiar options will be available and will work as they do now, but since this is a completely new system, you'll want to listen carefully to all the options as you get used to the new voice. We hope you like the change!*

## What should I do once the release is in?

A few months ago your credit union was asked to submit in writing your custom greeting message, hours and locations messages, and savings, certificate, and loan rate messages. Although reading the handwriting was sometimes a challenge, we did our very best to transcribe them so that they could be professionally re-recorded. We have done our proofreading and verified the recordings as much as possible. However, since we can't sign on to your member accounts in CU\*TALK, **it will be up to you to listen to and verify all of these messages when the system goes live.** If you have any changes, you will need to submit a CU\*TALK Configuration Change Request Form (available on the Reference Materials page of our web site, under "C") as usual and we will make the needed corrections.

NOTE: Remember that for the rate messages, the rates themselves come from CU\*BASE and can be adjusted by you using the "Update Audio Response Rates" option on menu MNMISC.

## What about a new phone number for my members?

As mentioned in earlier communications, one of the most exciting opportunities this change offers you right now is the ability to sign up for your own, unique telephone number that your members can use to access audio response. **No more credit union access code!** Members will hear your personalized greeting first and immediately be able to enter their member number and PIN.

**The cost of offering your own audio response 800 number will be just \$25.00 per month.**

We will begin processing orders for new numbers on a first-come, first-served basis beginning on August 1. (NOTE: If you indicated that you were interested in a separate number on the CU\*TALK custom messages form you completed in April, Shannon will be contacting you to discuss this further. Or give her a call at your convenience!)

Here is the procedure to order your new number:

1. Contact Shannon Sanford, Client Service Representative (ssanford@cuanswers.com or ext. 147).
2. Shannon will ask you some questions to complete the "Dedicated CU\*TALK Phone Number Request Form," including your preferred implementation date.
3. Shannon will submit your order to the appropriate team who will work with the phone company to set up your new number.
4. Statement inserts have been designed (similar to the one shown above) that announce the new number. If you are interested in using these customized inserts to announce the change to your members, contact Melinda Haehnel (mhaehnel@cuanswers.com or ext. 138) for pricing and to place your order.
5. Our team will take care of testing the new line and making sure that everything works properly. We will keep in contact throughout the process and let you know when the new number is live.

Allow approx. four weeks for assigning, implementing, configuring, and testing the new number. Remember that the old numbers will continue to be supported even after your new number is activated. You can elect to introduce the new number at any time without having to worry about members who don't get the message. You can even wait and

announce the change to your members after the new number goes into effect. (For example, you could turn on the new number and let staff and Board members try it for a week or two, then announce the number to members after that.)

## **What's next?**

This new technology allows us to take control of all future development, much like we did with CU\*@HOME several years ago. Enhancements such as text-to-speech (where you type something in CU\*BASE and the ARU system reads it) will be a reality in the coming months, and we will be looking at many new features that will give you new ways to better communicate with your members and meet their needs. Watch for more information soon!

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## THE NEXT GENERATION OF CU\*TALK IS COMING THIS SUMMER!

Spring has only just begun but we are already planning for some exciting changes this summer! At our June Leadership Conference this year we will roll out a brand new version of CU\*TALK Audio Response. This announcement is to give you a heads up and request some preparation work from your credit union now as we put the finishing touches on the system. Read on...

### ➔ A Little History

Last year we had to start making a shift in the Maxxar platform to deal with Microsoft phasing out the NT4 operating system. Maxxar announced its TNT product, and we were faced with the decision of how to manage the two parts of our ARU solution: the service bureau side managed here in Kentwood for 70+ clients, and the 14 turn-key CUs with their own ARU systems. For the first time in our history with Maxxar, these two strategies are about to diverge.

The turn-key clients were encouraged to move forward with the TNT product, and installations are already underway. The TNT platform is very different from our existing product and these credit unions are working through the reeducation of their members and all the challenges that a new product presents. On the service bureau side, CU\*Answers saw an opportunity to go in a new direction.

TCP/IP phone technology provides us an opportunity to code our own IVR (Interactive Voice Response) solution to be used in conjunction with CU\*BASE, similar to when we took over development of CU\*@HOME several years ago. Therefore, last year we began working with Interactive Intelligence, Inc. (I3) and Digital Dialogue on a project to convert our service bureau interface to an IP platform. This allows us to add members to our programming team with talents to develop either CU\*@HOME or our IP interfaces for audio response. This platform will greatly enhance both our development and client service capabilities.

Our partnership with I3 is not about buying IP phone technology; it is about adding a new development platform to our arsenal. Not only will we have more control over adding features, we will also be able to manage our automated phone attendants and the interface with our network software. Long term, we hope that this will lead us not only to writing a far better and more flexible audio response system, but also allow interfaces to CU\*BASE Phone Operator software and provide creative support for credit union automated phone attendants.

But that's still down the road a bit. We begin first with the transition away from the Maxxar platform to the I3 platform for all service bureau clients. Testing is already underway and the transition begins this summer.

### ➔ The Transition Plan

The new system has been coded to be as much like the existing CU\*TALK system as we could possibly make it. The call flow was designed to match the existing system, the options are the same, and the member experience is nearly identical. We do have to re-record all messages (see below for more on this), and the voice will switch back to a female. In fact, other than a new voice, we expect the impact on your members to be minimal.

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The exact release schedule is still being ironed out, but our plan is to release the new system for all users in mid-July. **There will be no change to the existing 616 or 800 phone numbers;** we will simply switch all calls coming in on the existing lines over to the new box.

## ➡ A New Choice: Your CU's Own Access Phone Number

One of the most exciting opportunities this change offers you right now is the ability to sign up for your own, unique telephone number that your members can use to access audio response. **No more credit union access code!** Members will hear your personalized greeting first and immediately be able to enter their member number and PIN.

**The cost of offering your own audio response 800 number will be just \$25.00 per month.**

Because the old numbers will continue to be supported even after the new system is in place, your credit union can elect to introduce the new number at any time without having to worry about members who don't get the message. During the transition period, members who call your new number would go to the new system; members who call the existing number would go to the old system. When the final rollout occurs in July, the old number will automatically be switched to access the new system, so these members would continue to be supported even down the road.

**Beta Test CUs Needed:** If you are interested in participating as a beta site so that you can begin moving your members to a new phone number before the full release in July, please contact Shannon Sanford (ext. 147 or [ssanford@cuanswers.com](mailto:ssanford@cuanswers.com)). The new system will be ready for beta-testing beginning in May.

We are developing some generic marketing materials that could be customized to announce the new phone number to your members in a statement insert. Please contact Shannon Sanford (ext. 147 or [ssanford@cuanswers.com](mailto:ssanford@cuanswers.com)) or Melinda Haehnel (ext. 138, [mhaehnel@cuanswers.com](mailto:mhaehnel@cuanswers.com)) if you have questions.

## ➡ Re-recording Your Custom Messages

Since the system is entirely new, we will need to re-record all custom CU messages to comply with the technical specifications for message structures on the new system. There are three areas of custom recordings:

- 1) Secondary greeting ("Welcome to ABC Credit Union...")
- 2) Branch locations and hours
- 3) Savings, certificate, and loan rates

We are unable to move existing messages over to the new system, so we need your help in documenting the message text so that it can be professionally recorded. Use the attached worksheet to fill in your messages for all three areas. This might even be a great time to freshen up and update the verbiage in your messages.

**Even if you don't want any changes, please complete all sections of the worksheet and return the completed form to Client Services, fax # 616-285-5735, no later than April 8.**

## ➡ Tasks You Need to Do Now

- Complete the CU\*TALK Custom Messages form and return it to Client Services no later than April 8, 2005.
- Decide whether or not you would like to begin offering a unique number for your members so they can bypass the credit union access code prompt.
  - If you do want to sign up for a number for your members, decide whether you would like to be an early adopter (beta tester) and start before July, or schedule the new number to begin later this year. **Beta testers, please**

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**contact Shannon Sanford (ext. 147 or [ssanford@canswers.com](mailto:ssanford@canswers.com)).** If you would like to talk with someone about ordering a number for later in the year, just check the box on the attached form.

- If you want to give your members a heads-up prior to the full switchover in July, we recommend some simple verbiage in your June quarterly statement, such as the following:

*This summer our CU\*TALK Audio Response system is getting a facelift....well, maybe we should call it a "voice" lift! Starting in mid-July, you will hear a new voice when you call audio response to check on your accounts or make a transfer. Behind the scenes there will be a brand-new system using the latest technology. The same familiar options will be available and will work as they do now, but since this is a completely new system, you'll want to listen carefully to all the options as you get used to the new voice. We hope you like the change!*

We are all excited about the possibilities of this new technology to provide an even higher level of service to your members in the future. You'll hear lots more down the road as we gear up our development team, and, as always, we welcome your input!

In the meantime, if you have any questions, please contact a Client Service Representative at 800-327-3478 or 616-285-5711.

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