

Client Services & Education

*CU*BASE Support & Training*



Meet the Team

Behind every successful organization are the people dedicated to its success. Our team is varied and fills many roles; championing and producing the Education Catalog, aiding clients with software and service questions, research, special projects, conversion support, and daily education keep our team busy with a little bit of everything! We can't wait to help your credit union thrive.

Team Mission >>>

The mission of the Client Services and Education Team is to provide assistance and training to help guide our clients and staff to success. Our main area of focus is providing staff and clients day-to-day support, and continued development through education.

Your success is our success!

Client Education Services

CU*Answers understands that not every training approach will work best for every credit union; therefore, we pride ourselves in offering a variety of training methods that accommodate the preferences of our clients from coast to coast! Our team not only provides a bevy of training styles to best fit your needs, we provide all basic training free of charge (the only exception is customized training, which incurs a nominal fee). The Client Services and Education Team encourages you to explore our various training methods:

Education Opportunities

- ✓ Web Conferences
- ✓ Classroom Training
- ✓ Workshops
- ✓ Individual Training
- ✓ Focus Groups
- ✓ OnDemand- CU*Answers
- ✓ Education Express
- ✓ Bedrock Community Credit Union
- ✓ Exercises for Success Workbooks
- ✓ CU*Answers Online University
- ✓ Your Own Online University
- ✓ Custom Training Edition
- ✓ Show Me The Steps
- ✓ Learning Café
- ✓ Release Training

Continued on next page...

Stay Current >>>

For additional training opportunities, please visit www.cuanswers.com or visit the Client Services and Education Online. store.cuanswers.com/client-services-and-education

Education Opportunities Cont.

Each of these methods are able to encompass relevant credit union topics such as regulation and compliance, marketing channels, collections, and your lending factory - it truly is not one size fits all when it comes to CU*Answers training. To ensure clients have the opportunity to prepare for year's upcoming pre-scheduled training opportunities as soon as possible, every year we mail the CU*Answers Education Catalog directly to your credit union!

Client Support Services

The Client Services and Education team specializes in a number of areas. From the client perspective, we are the front-line for software questions, education, and best practices. From daily phone and AnswerBook support to continuing conversion training, our team is here to help.

The Client Services and Education team also specializes in many special projects that are completed throughout each year! Our team adds many levels of value for our internal teams through daily support and special project requests.

We consider our partners part of our team as well, supporting them and their clients as we would our internal teams. The Client Service and Education experience that we give is very important to our team and our organization, therefore we set and monitor standards for client interactions and training.

Western Region Support >>>

***Did you know?** As of January 2nd, 2019, The Client Services and Education Team extended their services hours and now takes calls between the hours of 7:30 AM ET and midnight ET!*

1-800-327-3478

Support Services

- Front-line for software questions
- Client Education
- Event Coordination
- Internal education and support
- Best practices
- Special project requests
- Research
- Product implementation
- Support for our internal teams
- Support for our partners CU*Northwest and CU*South, along with their clients
- Pre-Conversion Training
- Post Conversion Support
- Transition Group Meetings



Professional Services

iText Installation

to allow credit unions to download dashboard data directly to your PC from GOLD

Build/Edit CU branch locations

to assist with configuring new branch locations

TruStage Requests

to assist with preparing and processing a membership file

Dividend Regeneration

to assist with regenerating member dividends

End of Month Verification

to assist with rate changes

Statement Verification

to ensure data on member statements is accurate

Balancing Requests

to provide assistance with teller drawer/ vault balancing

Household Regeneration

*to reorganize household data within CU*BASE*

AIRES Requests

to simplify processes required by your auditors

It'sMe247 Configuration Changes

to assist with making changes within It'sMe247 Online Banking

USER ID Additions and Deletions

to create a new employee or delete an existing

Security Officer Additions & Deletions

to create a new Security Officer or delete an existing

Upload/Download Authority Requests

*to add or change the ability for a user to download or upload information to CU*BASE*

CU Name Changes

to facilitate tasks related to changing the name of your credit union

CEO Changes

*to notify Xtend & CU*Answers employees of new CEO*

*For a list of current products and services, please visit the CU*Answers Client Services and Education Store:*

store.cuanswers.com/client-services-and-education



A Custom Training Edition (CTE)

The CTE gives your team a safe place to practice using CU*BASE tools, learn new skills, and experiment with new features without potential harm to your live member data. The CTE is files; of which includes both the product configurations and member accounts. This will make your customized training environment mimic what you see in your day-to-day environment.



*For product details, please visit the CU*Answers Client Services and Education Store:*
store.cuanswers.com/client-services-and-education

Your Own Online University

Want even more training for your staff? If your staff gravitates towards online learning, you might benefit from an expanded campus tailored to meet your credit union's needs. Our partnership with cu training inc offers you the opportunity to purchase your own campus that includes:

- *CU*BASE courses as offered in the CU*Answers online campus*
- *The full course catalog that includes additional credit union-specific courses*
- *Product information customized for your own staff*
- *Comprehensive learning management system (LMS) with tools to let you track individual student activity*
- *Individual development plans that allow supervisors to define what their own employees need to learn*
- *Testing and certification features including management reporting and analysis tools*

*For product details, please visit the CU*Answers Client Services and Education Store:*
store.cuanswers.com/client-services-and-education



6000 28th Street
Grand Rapids, Michigan 49546
(800) 327-3478
cuanswers.com



We keep your team moving forward!

Designed and proven to help your team transition from in-person support to standard remote support, our goal is to ensure your team is moving forward using the knowledge and training opportunities CU*Answers offers. We will work with your team to identify training needs, introduce you to our experts, and help you learn about all that CU*BASE has to offer.



Kristian Daniel
VP of MTG, Sales & Business Development
616.285.5711 | kristian.daniel@cuanswers.com