



2018 CEO Strategic Developers Boot Camp

Prioritizing What We Take To the Future:
As a CUSO, what do we want to manufacture?

November 5-9, 2018

CU^{ANSWERS}
A CREDIT UNION SERVICE ORGANIZATION

Why is 2019 different from previous years?

THEN



VS.

NOW



Why do we count on CEOs for success?

WE WORK HARD TO LISTEN TO THE CROWD, BUT CEOS ARE STILL THE KEY INGREDIENT

- Credit union CEOs have the responsibility of being the intersecting point between:



- Unless CEOs do their job for both sides of this question, we'll never effectively match solutions with the efforts of CUs in our network
- In our win-win solution, CEOs represent the owner persona, and CU staff represents the consumers
 - A CU looks at a person for these two roles; our CUSO looks at an organization for these roles in our future

All CEOs don't need to be active

The same CEOs don't need to be active every time

But we need a healthy community so that there is a material group of CEOs active at the right times

2018 CEO Strategic Developers Boot Camp

OUR AGENDA

A

Designing the Future of Internet Retailing

What will CEOs tell us about facing the inevitable?

The CUSO needs to spend 10x on OLB and mobile LOS – we need your leadership

B

Designing Teller Platforms for Our Future (Teller P3)

One-size-fits-all is not the future

The CUSO needs to better understand your strategic evolution for tellers, more than the tools tellers would like today

C

Designing the Future for Online and Mobile Tools (Online '19)

More evolution, or a concentrated effort at integration?

What do CEOs think will work?

The Next 6 Months

ENGAGING YOUR CREDIT UNION'S SUBJECT-MATTER EXPERTS

- This week's goals: To develop CUSO and credit union compatible strategies/vision
- The next phase: To develop the next-step tactics with CU experts (Boot Camp Task Force)
 - A deeper dive on the topics and ideas from this week's CEO Boot Camp
 - For project managers and people who are capable of rallying their CU to activate new solutions
 - Hoping to get 25 CU teams to join each task force



SAVE THE DATE

CUANSWERS

BOOT CAMP TASK FORCE

During the CEO Strategic Developers Boot Camp, CEOs brainstormed on the future of online and mobile tools from a big-picture, strategic point of view. Now we want to get credit union subject-matter experts involved. Join this Boot Camp Task Force and help us design new approaches for serving automated members, new ways of orchestrating the dance between the marketing value of a website and the actions of an online banking toolset, and new strategies for email and mobile apps.

ONLINE & MOBILE TOOLS

This Boot Camp Task Force will merge the tactical players at credit unions into a unit to solve today's questions surrounding websites, online banking, mobile channels, and more. This will be a 1.5 day event at CUAnswers.

In addition to recruiting your subject-matter experts, we're looking for credit unions who are willing to engage the Asterisk Intelligence team, enroll in its iM 247 Optics, and utilize storage in the data warehouse.

TENTATIVELY SCHEDULED FOR:
March 26 & 27

LOCATION:
CUANSWERS
6000 28TH STREET
GRAND RAPIDS, MI 49546

LOOK FOR SIGN-UPS IN JANUARY

CONTACT
800.327.3478
cuanswers.com



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CUANSWERS

BOOT CAMP TASK FORCE

During the CEO Strategic Developers Boot Camp, CEOs brainstormed on the future of internet banking from a big-picture, strategic point of view. Now we want to get credit union subject-matter experts involved. Join this Boot Camp Task Force and help us determine a vision for internet retailing. Imagine new ways for credit unions to sell loans via internet channels, and figure out how to stock the shelves of a credit union internet store.

FUTURE OF INTERNET RETAILING

This Boot Camp Task Force will merge the tactical players at credit unions into a unit to solve today's questions surrounding retailing, lending, internet channels, and more. This will be a 1.5 day event at CUAnswers.

In addition to recruiting your subject-matter experts, we're looking for credit unions who are willing to engage the LenderMP and Forms Generation team and enroll in online apps, forms, etc. Applicants will take an entrance test prior to admission.

TENTATIVELY SCHEDULED FOR:
April 23 & 24

LOCATION:
CUANSWERS
6000 28TH STREET
GRAND RAPIDS, MI 49546

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cuanswers.com



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CUANSWERS

BOOT CAMP TASK FORCE

During the CEO Strategic Developers Boot Camp, CEOs brainstormed on the future of teller platforms from a big-picture, strategic point of view. Now we want to get credit union subject-matter experts involved. Join this Boot Camp Task Force and help us envision three distinct teller approaches: the traditional in-person platform used today, a modern keep-it-simple design, and an app that would let tellers roam the lobby with a tablet.

TELLER PLATFORMS FOR OUR FUTURE

This Boot Camp Task Force will merge the tactical players at credit unions into a unit to solve today's questions surrounding branch management, tellers, budgets, and more. This will be a 1.5 day event at CUAnswers.

In addition to recruiting your subject-matter experts, we're looking for credit unions who are willing to engage the Teller Design, Carnegie Edge, and Imaging Solutions teams and have a strong desire to move the ball forward!

TENTATIVELY SCHEDULED FOR:
May 29 & 30

LOCATION:
CUANSWERS
6000 28TH STREET
GRAND RAPIDS, MI 49546

LOOK FOR SIGN-UPS IN JANUARY

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Format for Task Force Events

Day 1

3-5pm Defining the Task Force
5-6pm Networking cocktail hour

Day 2

9-4pm 2 hours on each major topic discussed this week by CEOs

The Next 12 Months

ENGAGING YOUR CREDIT UNION'S SUBJECT-MATTER EXPERTS

Between Now and the Task Force Event

- Communicate results of CEO Boot Camp
- Coordinate a virtual community for research
- Series of webinars designed for TNT (Teach Negotiate Tell)
 - For any interested CU participants
 - We'll explain the projects ahead
 - We'll provide data that will help with the design specifications for where we're going

After the Task Force Event

- Make go/no-go decisions: move forward dramatically or stay the path of evolution
- Complete design specifications for what's next
- Engage developers and implementers for pilot projects

If you're looking for a concrete projects with completion dates, we might not be ready with that until 2020

We're moving forward with the confidence that we'll make timely, contingent decisions when needed

Networking and the in-between ideas

NOW THAT WE HAVE YOUR ATTENTION...

- Whenever we get together with CEOs, we can't miss out on the chance to engage you on a thousand other topics that are percolating around CUs and solutions coming down the pipe
- We won't get agenda time for every one of these issues, but if you're looking to talk with someone, I hope you will reference this packet of materials (and I'll probably slip a few more in along the way...)

In your packet



Why we call it a Boot Camp

- Changing minds vs. selling a project
 - Debate
 - Thought-provoking work
 - Moments of confusion
 - Outright denial
-
- Changing the vendor-customer dynamic

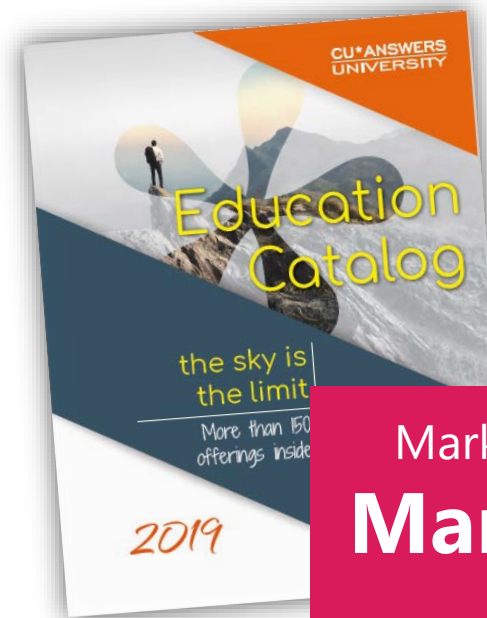


So what about CEO school?

CU*ANSWERS
UNIVERSITY

WE'LL STILL HAVE A FULL WEEK FOR CU SENIOR EXECUTIVES WITH THE CU*ANSWERS CEO

- 17.00 Introduction to Asterisk Intelligence and the CU*Answers Business Intelligence Help Desk ★NEW!★
- 17.01 Building Trust with Cooperative Owners: CUSOs and CUs ★NEW!★
- 17.02 Understanding the CU*Answers SDLC and Promoting Projects ★NEW!★
- 17.03 Adopting and Highlighting a Retail Strategy as a Senior Executive ★NEW!★
- 17.04 Evolving Retail Strategies Tactically: Facing the Inevitable Internet Influence ★NEW!★
- 17.05 Building a Firm with Digital Intelligence and Proving It to the Marketplace ★NEW!★
- 17.06 Action Through Consumer-Owners: Developing Delivery Channels That Face Both Personas ★NEW!★
- 17.07 Reporting Up and Delegating Down: Building Trust with Your Team and Your Board ★NEW!★
- 17.10 CU*BASE Management Tools for CEOs: Leadership Dashboards and Visual Analytics Tools (VAT) ★NEW!★
- 17.11 Data Warehouse Strategies for CEOs: Do They Fit with Your Future Plans? ★NEW!★
- 17.12 Educating Your Board with Data ★NEW!★
- 17.13 Expanding Your Audience for Data: Analytics Booth as the Foundation ★NEW!★
- 17.14 Database Management: Tool Spotlight for CEOs ★NEW!★
- 17.15 Getting Started with Unique Data Management (UDM) for CEOs ★NEW!★



Mark your calendars:
**March 18-20,
2019**

**An extension of the CU*Answers
Executive Study series, for students of
cooperative design leadership**

Let's Get Acquainted

45 minutes



- Round-robin introductions
 - Your name and title
 - Credit union name and location
 - Asset size
 - # of members

- Of the 3 topics we're going to discuss, which is your #1 priority?
 - Internet Retailing
 - Teller
 - Online/Mobile Tools

- Of the 3 topics, which are you most uncomfortable talking about publicly with your peers?