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

November 5-9, 2018
Why is 2019 different from previous years?

THEN

NOW

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

- What should the CUSO do?
- What will CUs do with it?

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.
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<thead>
<tr>
<th></th>
<th>Our Agenda</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Designing the Future of Internet Retailing</td>
</tr>
<tr>
<td></td>
<td>What will CEOs tell us about facing the inevitable?</td>
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<tr>
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<td>The CUSO needs to spend 10x on OLB and mobile LOS – we need your leadership</td>
</tr>
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<td>B</td>
<td>Designing Teller Platforms for Our Future (Teller P3)</td>
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<td></td>
<td>One-size-fits-all is not the future</td>
</tr>
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<td>The CUSO needs to better understand your strategic evolution for tellers, more than the tools tellers would like today</td>
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<tr>
<td>C</td>
<td>Designing the Future for Online and Mobile Tools (Online ’19)</td>
</tr>
<tr>
<td></td>
<td>More evolution, or a concentrated effort at integration?</td>
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<td>What do CEOs think will work?</td>
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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

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
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...)

Networking and the in-between ideas

NOW THAT WE HAVE YOUR ATTENTION...
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?

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 CU★ 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 Persons ★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?