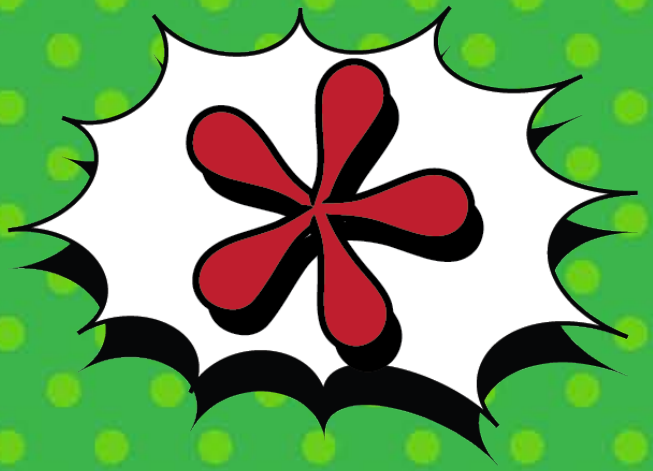
BOOT CAMPS: WHERE DO WE GO FROM HERE?

THE BOOT CAMPS TURNED OUT TO BE ONE OF MY FAVORITE PROXY EVENTS EVER



"WHAT MAKES DATA VALUABLE?"

BOOT CAMP

THE "WHAT MAKES DATA VALUABLE?" BOOT CAMP

STARTED IN 2016, WILL END WITH THE 2018 GRADUATING CLASS (FOR NOW)

- This boot camp was designed to pick up on the themes of CEO School and transfer the work to CU executives, day to day
  - Identifying the value of data
  - The teams that will lead the way
  - How CUs and credit union professionals will benefit in the future
- Its greatest accomplishment was breathing life into Asterisk Intelligence
  - The star of the show is Analytics Booth and how it will carry our network into browser solutions for years to come

ASTERISK INTELLIGENCE

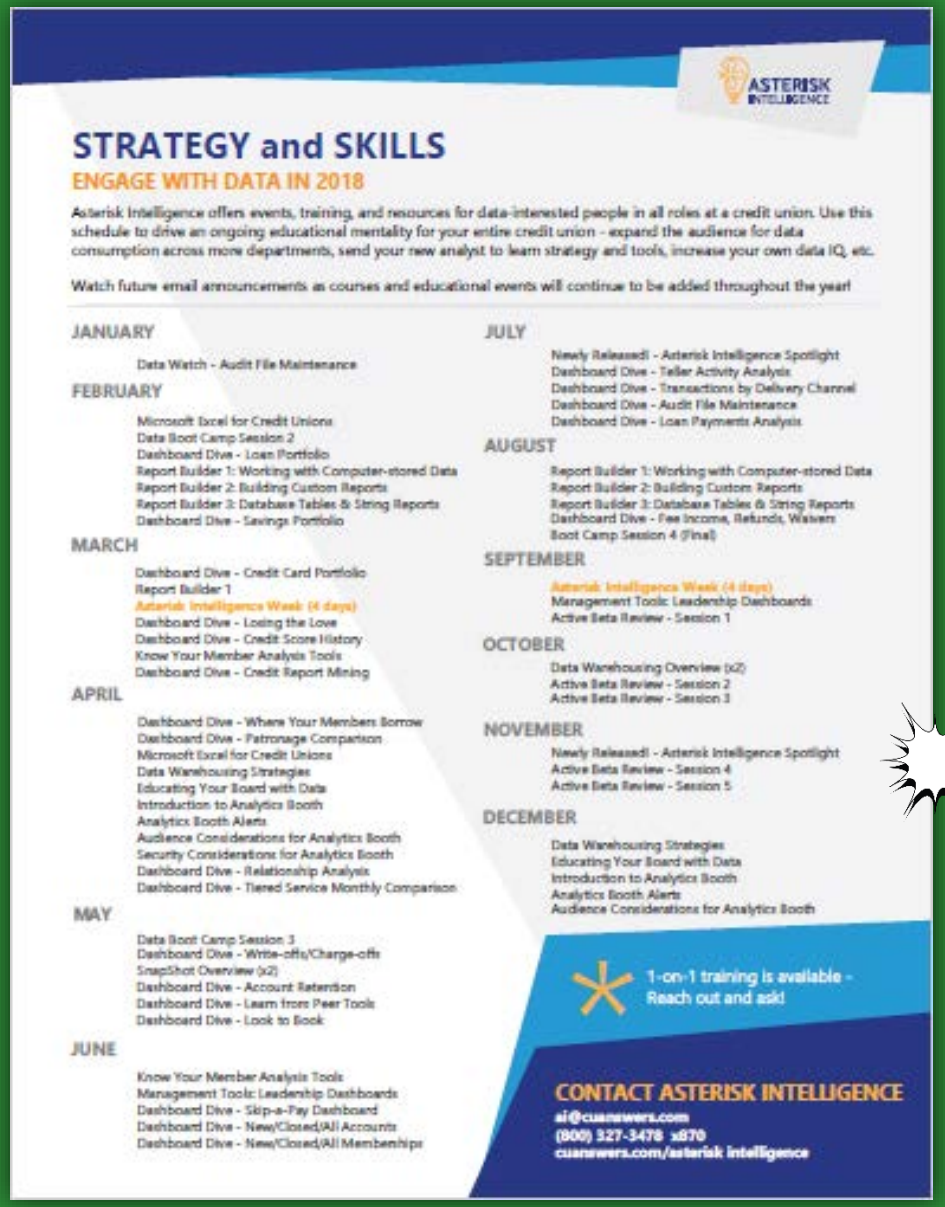
ANALYTICS BOOTH

No Data Boot Camp planned for 2019 – instead we'll go hyperactive with Asterisk Intelligence holding the wheel

ASTERISK INTELLIGENCE

DATA EVENTS WILL REPLACE DATA BOOT CAMP IN 2019

- We started with CEOs
  - **Inspire the strategy**
- We moved on to creating an army of credit union data executives
  - **Inspire the doers**
- In 2019, we'll go POV and create a network of interested credit union stakeholders, ready to dive into analytics
  - **Inspire an audience**



ASTERISK INTELLIGENCE

STRATEGY and SKILLS

ENGAGE WITH DATA IN 2018

Asterisk Intelligence offers events, training, and resources for data-interested people in all roles at a credit union. Use this schedule to drive an ongoing educational mentality for your entire credit union - expand the audience for data consumption across more departments, send your new analyst to learn strategy and tools, increase your own data IQ, etc.

Watch future email announcements as courses and educational events will continue to be added throughout the year!

JANUARY
- Data Watch - Audit File Maintenance

FEBRUARY
- Microsoft Excel for Credit Unions
- Data Boot Camp Session 2
- Dashboard Dive - Loan Portfolio
- Report Builder 1: Working with Computer-stored Data
- Report Builder 2: Building Custom Reports
- Report Builder 3: Database Tables & String Reports
- Dashboard Dive - Savings Portfolio

MARCH
- Dashboard Dive - Credit Card Portfolio
- Report Builder 1
- Asterisk Intelligence Week (4 days)
- Dashboard Dive - Losing the Love
- Dashboard Dive - Credit Score History
- Know Your Member Analysis Tools
- Dashboard Dive - Credit Report Mining

APRIL
- Dashboard Dive - Where Your Members Borrow
- Dashboard Dive - Patronage Comparison
- Microsoft Excel for Credit Unions
- Data Warehousing Strategies
- Educating Your Board with Data
- Introduction to Analytics Booth
- Analytics Booth Alerts
- Audience Considerations for Analytics Booth
- Security Considerations for Analytics Booth
- Dashboard Dive - Relationship Analysis
- Dashboard Dive - Tiered Service Monthly Comparison

MAY
- Data Boot Camp Session 3
- Dashboard Dive - Write-offs/Charge-offs
- SnapShot Overview (x2)
- Dashboard Dive - Account Retention
- Dashboard Dive - Learn from Peer Tools
- Dashboard Dive - Look to Book

JUNE
- Know Your Member Analysis Tools
- Management Tools: Leadership Dashboards
- Dashboard Dive - Skip-a-Pay Dashboard
- Dashboard Dive - New/Closed/All Accounts
- Dashboard Dive - New/Closed/All Memberships

JULY
- Newly Released! - Asterisk Intelligence Spotlight
- Dashboard Dive - Teller Activity Analysis
- Dashboard Dive - Transactions by Delivery Channel
- Dashboard Dive - Audit File Maintenance
- Dashboard Dive - Loan Payments Analysis

AUGUST
- Report Builder 1: Working with Computer-stored Data
- Report Builder 2: Building Custom Reports
- Report Builder 3: Database Tables & String Reports
- Dashboard Dive - Fee Income, Refunds, Waivers
- Boot Camp Session 4 (Final)

SEPTEMBER
- Asterisk Intelligence Week (4 days)
- Management Tools: Leadership Dashboards
- Active Beta Review - Session 1

OCTOBER
- Data Warehousing Overview (x2)
- Active Beta Review - Session 2
- Active Beta Review - Session 3

NOVEMBER
- Newly Released! - Asterisk Intelligence Spotlight
- Active Beta Review - Session 4
- Active Beta Review - Session 5

DECEMBER
- Data Warehousing Strategies
- Educating Your Board with Data
- Introduction to Analytics Booth
- Analytics Booth Alerts
- Audience Considerations for Analytics Booth

1-on-1 training is available - Reach out and ask!

CONTACT ASTERISK INTELLIGENCE

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cuanswers.com/asterisk intelligence

"BUILDING SOLUTIONS IN A COOPERATIVE"

BOOT CAMP

THE "BUILDING SOLUTIONS IN A COOPERATIVE" BOOT CAMP

STARTED IN 2016, WILL END WITH THE 2018 GRADUATING CLASS

- This boot camp was designed to close the gap between insiders and our external stakeholders
  - Understanding our prioritization model
  - How it applies to our cooperative's forward action
- Its greatest accomplishment was breathing life into two new models for including everyone in the process of prioritizing solutions as peers
  - The star of the show is Owner's Voice and Owner's View
  - The catalyst for DIT/DIY and our DHD response

Owner's VOICE

Owner's VIEW

DHD | DEVELOPER'S HELP DESK

No Solutions Boot Camp for 2019 – instead we'll hold a "virtual" boot camp for project managers via Owner's View

2019-2010 VIRTUAL BOOT CAMPS

- In 2019 we've committed to executing on the vision of our boot campers to walk the talk
  - The Product Team and the DHD will market, educate, and interact with all network participants to engage these new services
- We'll actively engage all comers – experience your voice making a difference in the creative process at CU*Answers

NEW OPPORTUNITIES COMING IN 2019

- New CU*Answers University course: *Understanding the CU*Answers SDLC and Promoting Projects*
- Opportunities for POV participation with the CU*Answers Product Team
- 12 monthly Owner's Voice elections
- New educational opportunities related to your internal project managers and Owner's View

The DHD team will be dedicated to more than just doing custom code, it will be your advocate for better project management and getting things done

Owner's VOICE

SIGN UP TODAY!

Owner's VOICE | CU*ANSWERS

Forum Home

Poll runs till Sun Jul 01, 2018 1:10 pm

You may select up to 4 options

47694 - Add button for viewing web-version of accrual dashboard to Loan, CD, and Share

47917 - Add configuration entry to Tiered Services (Services per

47265 - Write and implement a method for an accommodatin

47853 - Analytics Booth: prepare sample site - beta.analytics

47859 - Add MLA indicator to MASTRL.

Project Detailed Description

Add a Yes No check box to indicate whether a member is a covered borrower under the Military Lending Act (MLA). The new field could be stored in MASTRL.

an History Das

to Analytic ooth.

or can plug in and process.

45154 - Create an API for the Dividend and Interest Summary in Online Banking.

43744 - Add OTB Loans to Cross Account Transfers in It's Me 247.

47734 - Enhance the loan product defaults to allow for months or years as a default number before maturity date.

43537 - Create the ability to assign login code types to each Vendor Application for API logins in Online Banking.

44875 - Prevent overwrite of different file format for Append File functionality for future dashboards.

45323 - Integrate Password History API into Online Banking.

Expanded project descriptions

Save projects you want to track

Saved Projects

Help Us Decide What To Do Next

Enhancements

47557

47560

44959

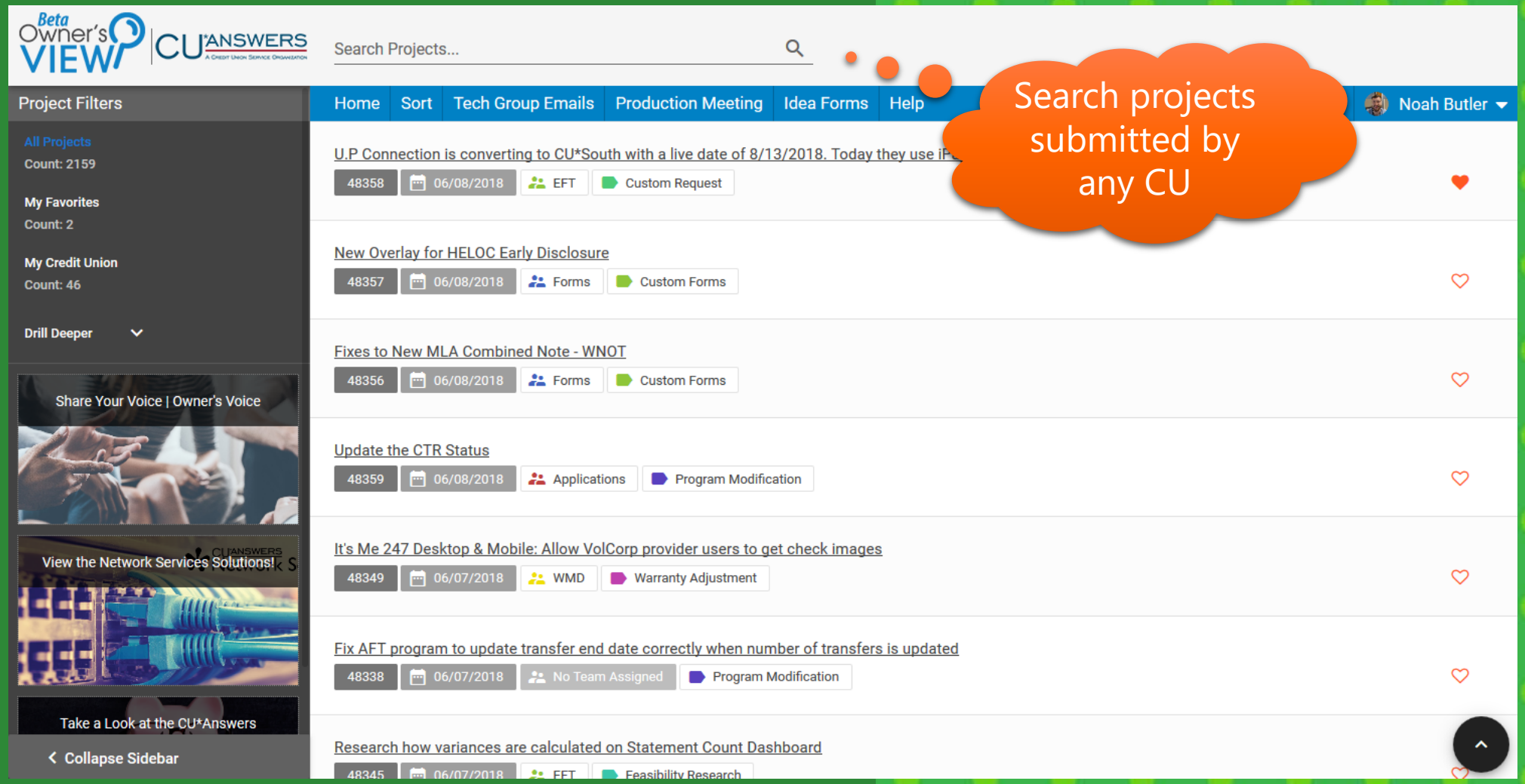
47465

47938

Save Project

Owner's VIEW

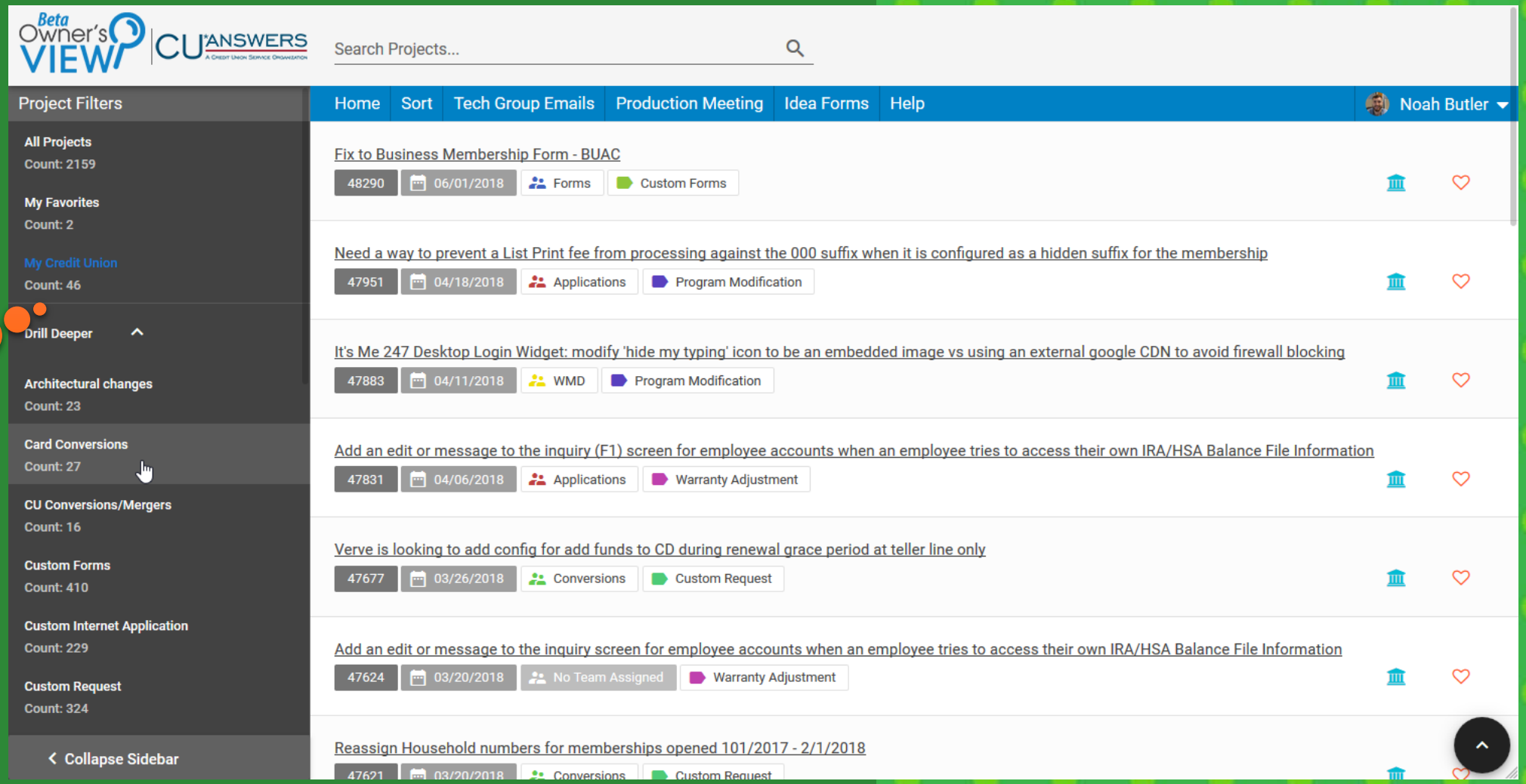
IN DEVELOPMENT NOW



Owner's VIEW

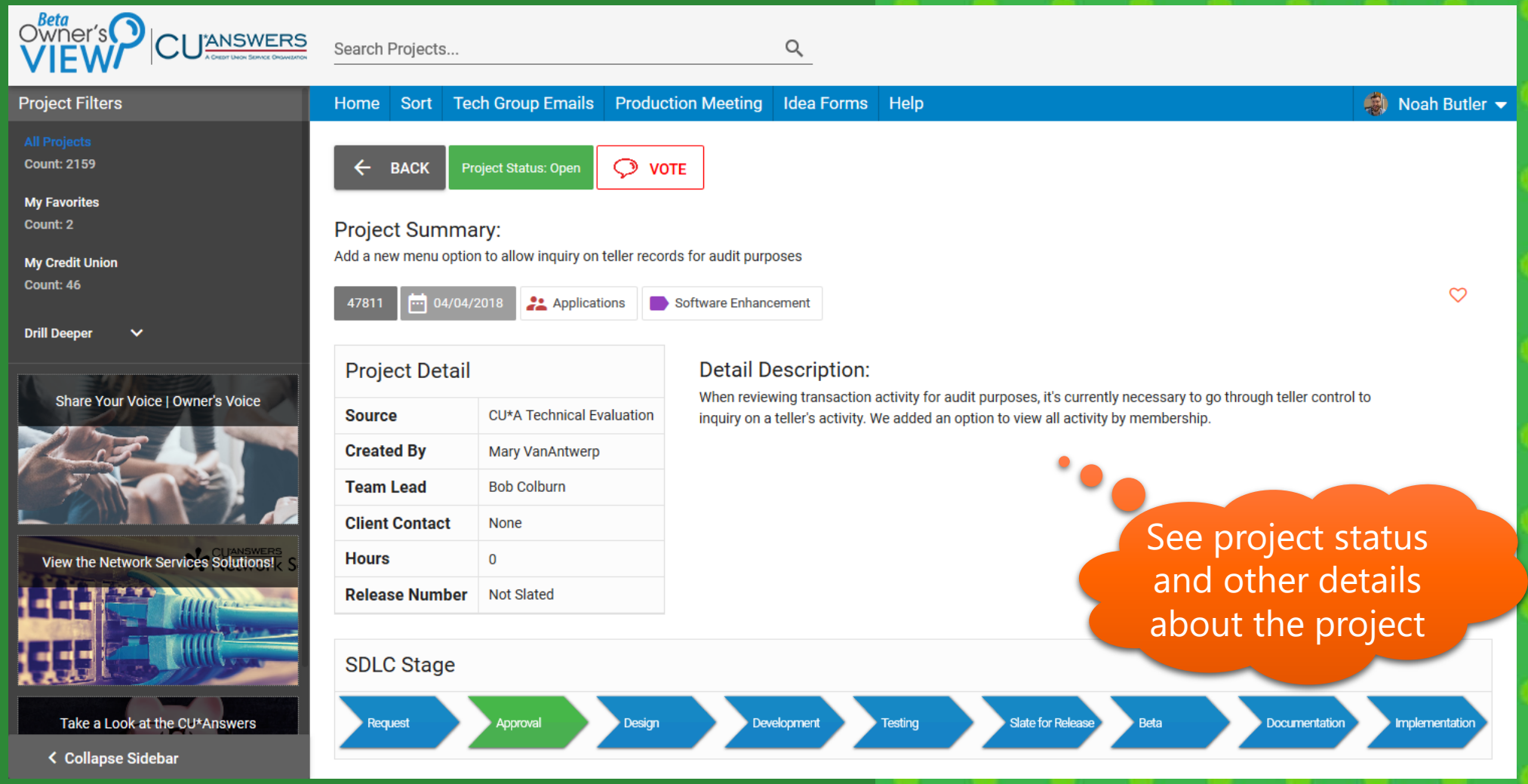
IN DEVELOPMENT NOW

See only your credit union's projects



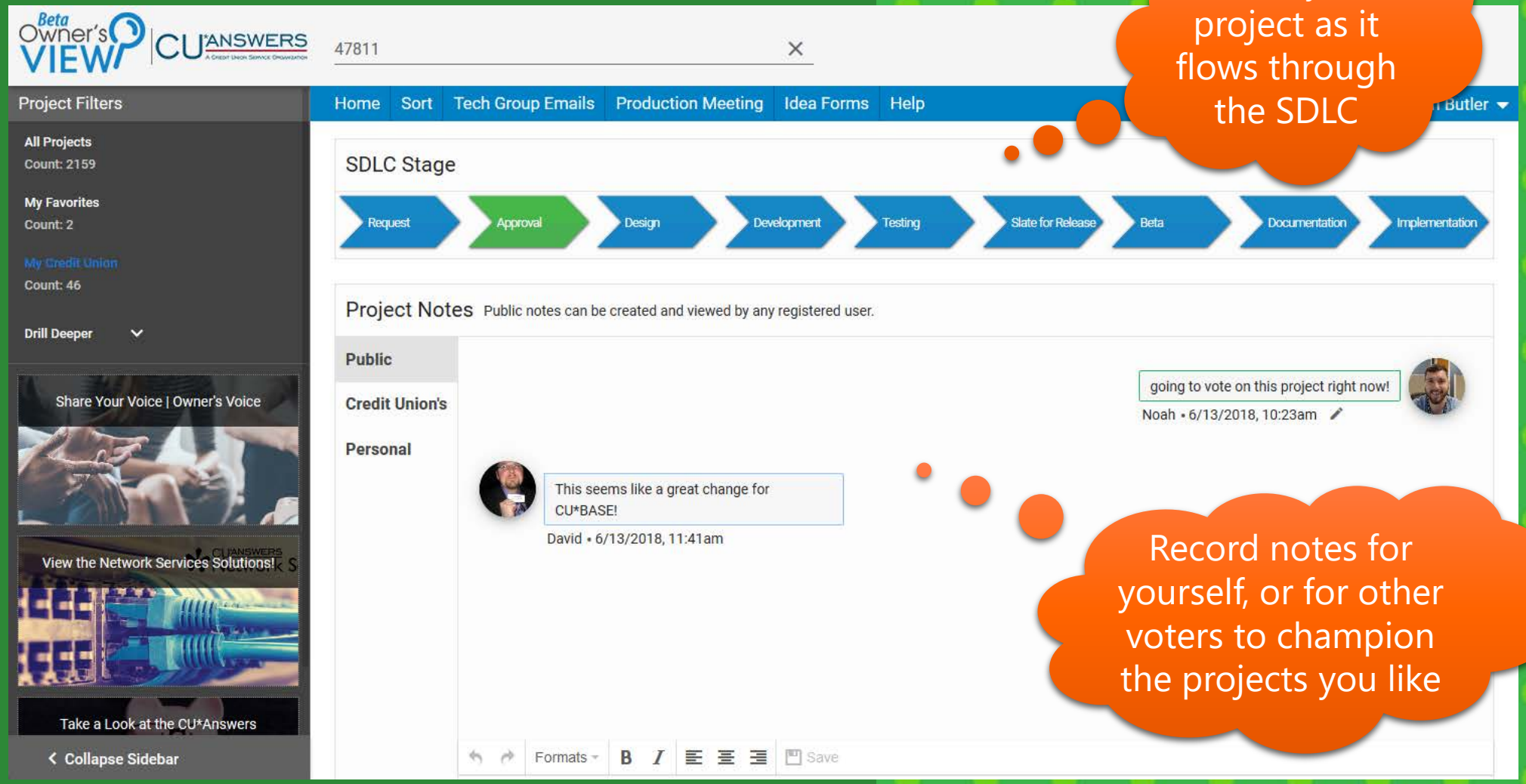
Owner's VIEW

IN DEVELOPMENT NOW



Owner's VIEW

IN DEVELOPMENT NOW



DEVELOPER'S HELP DESK

DESIGN STUDIO PROJECTS

JUN-NOV 2017 COMPARED TO DEC-MAY 2018

# of project requests ↑ by 71.4%

Project bids ↑ by $400K
(over $1.1 million bids given since last March)

Avg. 38 bids/mo. (↑ from 22)

Avg. 16.2 projects completed/mo.
(5,000 programming hours)

83 projects currently in the queue

THE DHD STORE

JULY-DEC 2017 COMPARED TO JAN-JUN 2018

# of users ↑ by 28%
new users ↑ by 25%+

For the last 6 months, DHD has been the most visited shelf in the CU*Answers store

DEVELOPER'S HELP DESK

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THE DHD STORE

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PRIORITIES

DIT

DIY

"DEVELOPER'S HELP DESK"

BOOT CAMP

THE "DEVELOPER'S HELP DESK" BOOT CAMP

STARTED IN 2018, WILL CONTINUE FOR AT LEAST THE NEXT TWO YEARS (2019-2020)

- This boot camp is designed to help credit union project managers be the general contractor to drive their ideas all the way to solutions
  - In the spirit of Junior Achievement, it takes a community to build a solution
- In 2018 we looked for 6 participants, got 3, and 1 made it all the way to the finish line

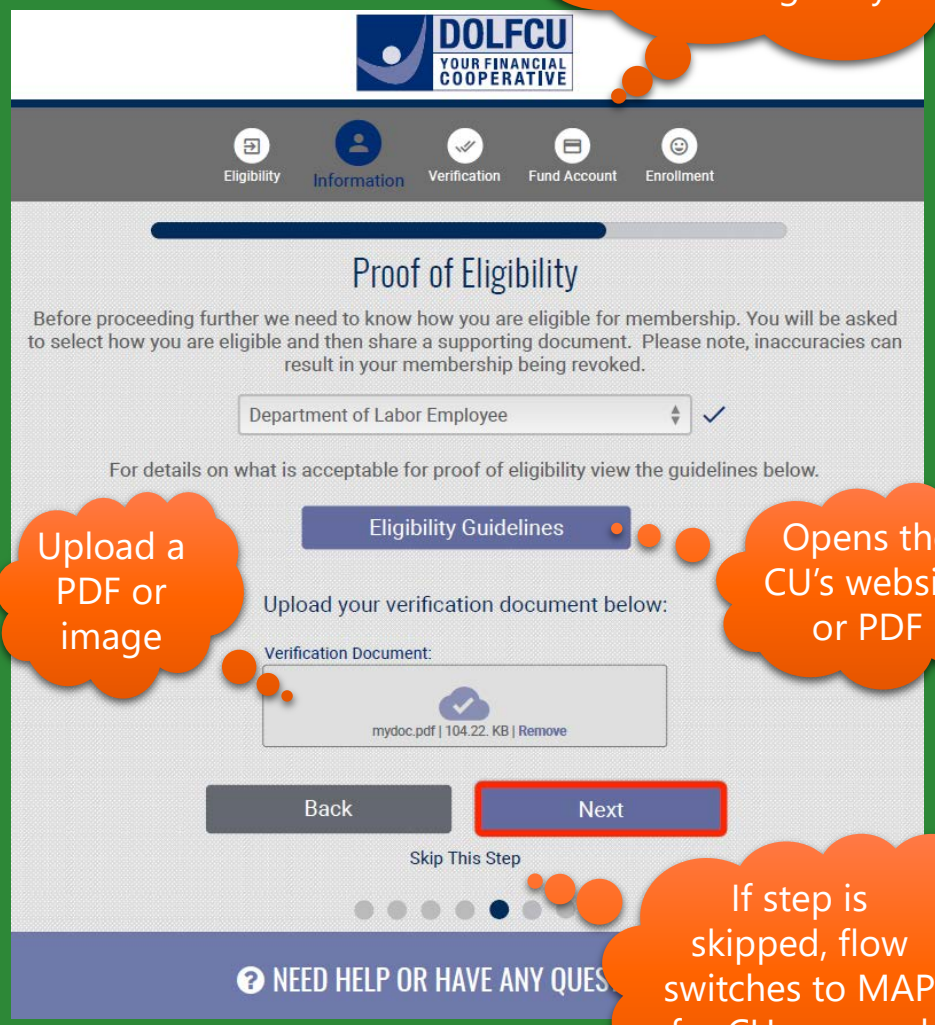
2018 DHD BOOT CAMP PROJECT: MEV FOR MOP

- Add member eligibility verification into the MOP workflow
- Upload documents for proof of eligibility

If we're right about DIT vs. DIY, this Boot Camp might go on for another 10 years

MEV FOR MOP

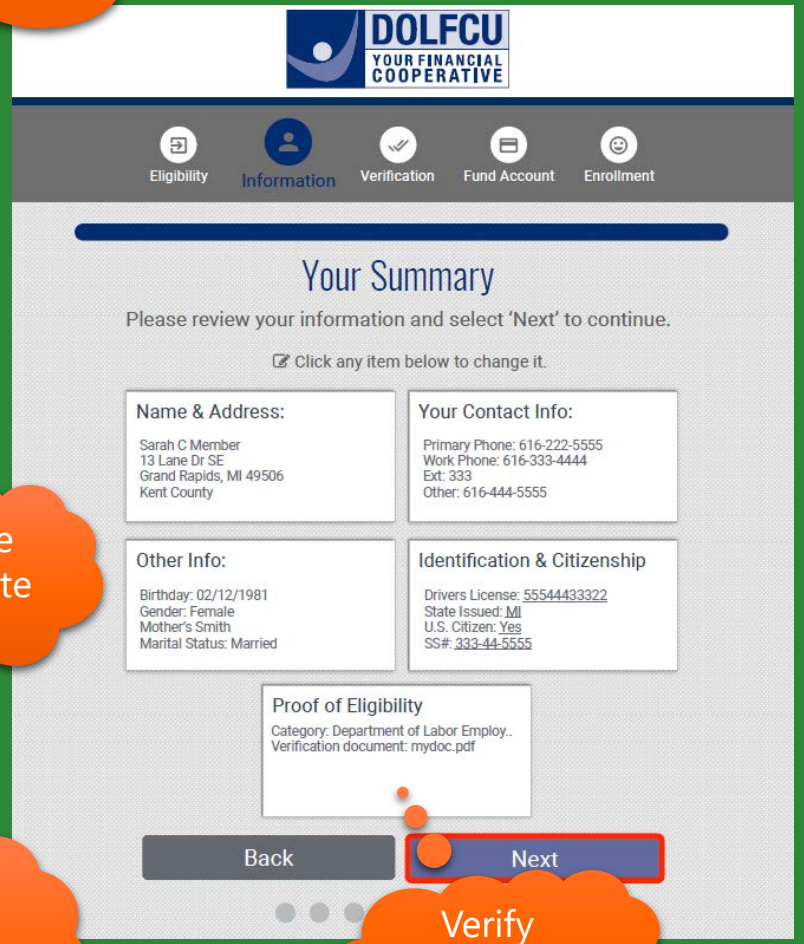
Custom online form inserted into the MOP workflow for member eligibility



Upload a PDF or image

Opens the CU's website or PDF

If step is skipped, flow switches to MAP for CU approval



Verify successful upload

Once a document is uploaded, the normal MOP flow resumes

WHAT DO WE ALL GET FROM THE DHD BOOT CAMP PROJECT?

IMPROVE SOMETHING NOW, AND BUILD A REPEATABLE PROCESS FOR THE FUTURE

The Big Picture: **Get to the Future Faster**

- Create a laboratory to encourage CU project manager wannabes to act sooner rather than later
- Refine CU*Answers' response to custom requests and build a better assembly line for project success
- Create an opportunity for more than one way or one team to interact and build solutions

A Bit Closer to Home: **A Better MOP in 2019**

This project will yield a new capability in MOP to:

- Receive images (driver's licenses, etc.)
- Collect signatures
- Prompt members to fill out additional forms during the MOP process

We hope you will bring an idea to the DHD Boot Camp next year