

BOOT CAMPS: WHERE DO WE GO FROM HERE?

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



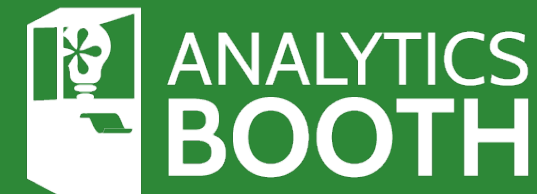
"WHAT MAKES DATA VALUABLE?"

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



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

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




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!

<p>JANUARY</p> <p>Data Watch - Audit File Maintenance</p> <p>FEBRUARY</p> <p>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</p> <p>MARCH</p> <p>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</p> <p>APRIL</p> <p>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</p> <p>MAY</p> <p>Data Boot Camp Session 3 Dashboard Dive - Write-offs/Charge-offs SnapShot Overview (Q2) Dashboard Dive - Account Retention Dashboard Dive - Learn from Peer Tools Dashboard Dive - Look to Book</p> <p>JUNE</p> <p>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</p>	<p>JULY</p> <p>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</p> <p>AUGUST</p> <p>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)</p> <p>SEPTEMBER</p> <p>Asterisk Intelligence Week (4 days) Management Tools: Leadership Dashboards Active Beta Review - Session 1</p> <p>OCTOBER</p> <p>Data Warehousing Overview (Q2) Active Beta Review - Session 2 Active Beta Review - Session 3</p> <p>NOVEMBER</p> <p>Newly Released! - Asterisk Intelligence Spotlight Active Beta Review - Session 4 Active Beta Review - Session 5</p> <p>DECEMBER</p> <p>Data Warehousing Strategies Educating Your Board with Data Introduction to Analytics Booth Analytics Booth Alerts Audience Considerations for Analytics Booth</p>
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"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

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 | <input type="checkbox"/> |
| 47917 - Add configuration entry to Tiered Services (Services per | <input type="checkbox"/> |
| 47265 - Write and implement a method for an accommodating | <input type="checkbox"/> |
| 47853 - Analytics Booth: prepare sample site - beta.analytics | <input type="checkbox"/> |
| 47859 - Add MLA indicator to MASTRL. | <input checked="" type="checkbox"/> |
| 45154 - Create an API for the Dividend and Interest Summary in Online Banking. | <input type="checkbox"/> |
| 43744 - Add OTB Loans to Cross Account Transfers in It's Me 247. | <input type="checkbox"/> |
| 47734 - Enhance the loan product defaults to allow for months or years as a default number before maturity date. | <input type="checkbox"/> |
| 43537 - Create the ability to assign login code types to each Vendor Application for API logins in Online Banking. | <input type="checkbox"/> |
| 44875 - Prevent overwrite of different file format for Append File functionality for future dashboards. | <input type="checkbox"/> |
| 45323 - Integrate Password History API into Online Banking. | <input type="checkbox"/> |

Expanded project descriptions

Save projects you want to track

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.

Saved Projects

Help Us Decide
What To Do Next

Enhancements

47557 ✕

47560 ✕

44959 ✕

47465 ✕

47938 ✕

Save Project



Owner's VIEW

IN DEVELOPMENT NOW

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Beta Owner's VIEW | CU*ANSWERS A CREDIT UNION SERVICE ORGANIZATION

Search Projects...

Home Sort Tech Group Emails Production Meeting Idea Forms Help

Noah Butler

Project Filters

- All Projects
Count: 2159
- My Favorites
Count: 2
- My Credit Union
Count: 46
- Drill Deeper

Share Your Voice | Owner's Voice

View the Network Services Solutions

Take a Look at the CU*Answers

< Collapse Sidebar

U.P Connection is converting to CU*South with a live date of 8/13/2018. Today they use iF

48358 06/08/2018 EFT Custom Request

New Overlay for HELOC Early Disclosure

48357 06/08/2018 Forms Custom Forms

Fixes to New MLA Combined Note - WNOT

48356 06/08/2018 Forms Custom Forms

Update the CTR Status

48359 06/08/2018 Applications Program Modification

It's Me 247 Desktop & Mobile: Allow VolCorp provider users to get check images

48349 06/07/2018 WMD Warranty Adjustment

Fix AFT program to update transfer end date correctly when number of transfers is updated

48338 06/07/2018 No Team Assigned Program Modification

Research how variances are calculated on Statement Count Dashboard

48345 06/07/2018 EFT Feasibility Research

Search projects submitted by any CU

IN DEVELOPMENT NOW

See only
your
credit
union's
projects



[Home](#)
[Sort](#)
[Tech Group Emails](#)
[Production Meeting](#)
[Idea Forms](#)
[Help](#)
Noah Butler ▾

Project Filters

- [All Projects](#)
Count: 2159
- [My Favorites](#)
Count: 2
- [My Credit Union](#)
Count: 46
- [Drill Deeper ▾](#)

[Collapse Sidebar](#)

← BACK
Project Status: Open
VOTE

Project Summary:
 Add a new menu option to allow inquiry on teller records for audit purposes

47811
04/04/2018
Applications
Software Enhancement

Project Detail

Source	CU*A Technical Evaluation
Created By	Mary VanAntwerp
Team Lead	Bob Colburn
Client Contact	None
Hours	0
Release Number	Not Slated

Detail Description:
 When reviewing transaction activity for audit purposes, it's currently necessary to go through teller control to inquiry on a teller's activity. We added an option to view all activity by membership.

SDLC Stage

Request
Approval
Design
Development
Testing
Slate for Release
Beta
Documentation
Implementation

See project status
and other details
about the project

Owner's VIEW

IN DEVELOPMENT NOW

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Watch your
project as it
flows through
the SDLC

The screenshot displays the Beta Owner's VIEW CU*ANSWERS interface. The top navigation bar includes links for Home, Sort, Tech Group Emails, Production Meeting, Idea Forms, and Help. The left sidebar contains filters for All Projects (Count: 2159), My Favorites (Count: 2), and My Credit Union (Count: 46). The main content area shows the SDLC Stage flow: Request, Approval (highlighted in green), Design, Development, Testing, Slate for Release, Beta, Documentation, and Implementation. Below the flow, the Project Notes section shows public notes. A note from Noah, dated 6/13/2018 at 10:23am, states "going to vote on this project right now!". A note from David, dated 6/13/2018 at 11:41am, states "This seems like a great change for CU*BASE!". The bottom of the interface includes a "Collapse Sidebar" button and a rich text editor with formatting options (Bold, Italic, Bulleted List, Numbered List, Indent) and a Save button.

Beta Owner's VIEW CU*ANSWERS 47811

Home Sort Tech Group Emails Production Meeting Idea Forms Help

Project Filters

- All Projects
Count: 2159
- My Favorites
Count: 2
- My Credit Union
Count: 46
- Drill Deeper

SDLC Stage

Request Approval Design Development Testing Slate for Release Beta Documentation Implementation

Project Notes Public notes can be created and viewed by any registered user.

Public

Credit Union's

Personal

going to vote on this project right now!
Noah • 6/13/2018, 10:23am

This seems like a great change for CU*BASE!
David • 6/13/2018, 11:41am

Share Your Voice | Owner's Voice

View the Network Services Solutions

Take a Look at the CU*Answers

< Collapse Sidebar

Formats B I [List Icons] Save

Record notes for
yourself, or for other
voters to champion
the projects you like



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



DESIGN STUDIO PROJECTS

JUN-NOV 2017 COMPARED TO DEC-MAY 2017

of projects

Pr

83 projects

PRIORITIES

DIT

DIY



THE DHD STORE

JULY-DEC 2017 COMPARED TO JAN-JUN 2018

of users ↑ by 28%

new users ↑ by 25%+

been



"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

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Custom online form
inserted into the MOP
workflow for member
eligibility

Step 1: Proof of Eligibility

Before proceeding further we need to know how you are eligible for membership. You will be asked to select how you are eligible and then share a supporting document. Please note, inaccuracies can result in your membership being revoked.

Department of Labor Employee ✓

For details on what is acceptable for proof of eligibility view the guidelines below.

[Eligibility Guidelines](#)

Upload your verification document below:

Verification Document:

mydoc.pdf | 104.22 KB | Remove

[Back](#) [Next](#)

Skip This Step

NEED HELP OR HAVE ANY QUESTIONS?

Step 2: Your Summary

Please review your information and select 'Next' to continue.

Click any item below to change it.

Name & Address:

Sarah C Member
13 Lane Dr SE
Grand Rapids, MI 49506
Kent County

Your Contact Info:

Primary Phone: 616-222-5555
Work Phone: 616-333-4444
Ext: 333
Other: 616-444-5555

Other Info:

Birthday: 02/12/1981
Gender: Female
Mother's Name: Mother's Smith
Marital Status: Married

Identification & Citizenship

Drivers License: 55544433322
State Issued: MI
U.S. Citizen: Yes
SS#: 333-44-5555

Proof of Eligibility

Category: Department of Labor Employ..
Verification document: mydoc.pdf

[Back](#) [Next](#)

Step 3: You're Almost There

Next, we need to verify your identity by asking you 5 questions. Don't worry, if you don't pass or wish to proceed with online ID verification, we are still happy to accept your application and one of our representatives will contact you to help complete your membership.

- ✓ ID Verification is Convenient
- ✓ Only 3-6 Questions
- ✓ Even if you don't pass, your application is still submitted

[No, proceed without online ID verification](#) [Yes, proceed with online ID verification](#)

Once a document is uploaded, the normal MOP flow resumes

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

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