Defining Teller Platforms for our Future

RETAIL STRATEGIES IN FLUX REQUIRE INVESTMENTS THAT COVER THE BOARD

A renewed focus on tellers and the lobby retailing channel

MANY OF YOU ARE THINKING, "IT'S ABOUT TIME, IDIOT"

T1: Soup-to-nuts

- The next generation of our existing comprehensive teller platform
- Will borrow enhance-ments from what we learn with T2
- Will track through our normal release processes through 2019-2021

T2: KISS (Express Teller)

- Across-the-counter teller tool, streamlined and simplified for today's tellers
- "New write" – building from the ground up, not just rewriting T1
- Expect a grand opening by fall of 2020

T3: Floating

- App for roving teller, API-based to support non-CU*BASE teller integrations
- Facilitating ITM vendor solutions, preparing for an MTG app solution
- Reliant on champions and third-party investments

These have been some of the most fun sessions for me in 2019 – getting back to some of our earliest designs

On the way to the future, things change

TRUST WE'RE MOVING FORWARD, BUT CONSTANTLY VERIFY WHERE AND HOW

Resources > In the Kitchen

Updated April 26, 2019

Designing Teller Platforms for Our Future (Teller 3P)

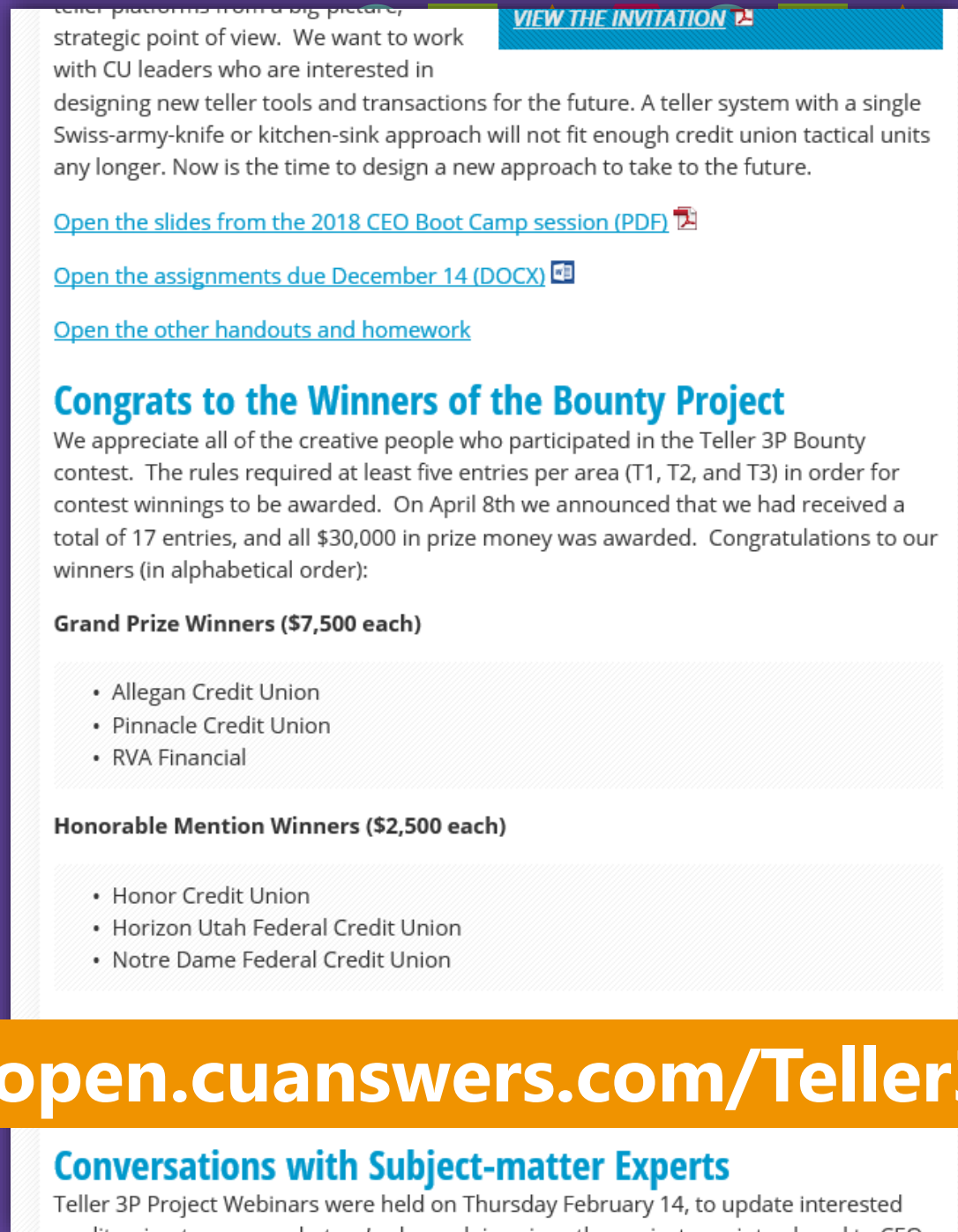
May 29 & 30
DESIGNING TELLER PLATFORMS FOR OUR FUTURE (TELLER 3P)
A CEO Strategic Boot Camp Initiative

A CEO Strategic Boot Camp Initiative

November 2018: During the CEO Strategic Developers Boot Camp in November 2018, CEOs brainstormed on the future of teller platforms from a big-picture,

REGISTER TODAY!
SPACE IS LIMITED TO 25 PARTICIPANTS

DESIGNING TELLER PLATFORMS FOR OUR FUTURE (TELLER 3P)
TASK FORCE EVENT | MAY 29 & 30
VIEW THE INVITATION



VIEW THE INVITATION

strategic point of view. We want to work with CU leaders who are interested in designing new teller tools and transactions for the future. A teller system with a single Swiss-army-knife or kitchen-sink approach will not fit enough credit union tactical units any longer. Now is the time to design a new approach to take to the future.

Open the slides from the 2018 CEO Boot Camp session (PDF)

Open the assignments due December 14 (DOCX)

Open the other handouts and homework

Congrats to the Winners of the Bounty Project

We appreciate all of the creative people who participated in the Teller 3P Bounty contest. The rules required at least five entries per area (T1, T2, and T3) in order for contest winnings to be awarded. On April 8th we announced that we had received a total of 17 entries, and all $30,000 in prize money was awarded. Congratulations to our winners (in alphabetical order):

Grand Prize Winners ($7,500 each)

- Allegan Credit Union
- Pinnacle Credit Union
- RVA Financial

Honorable Mention Winners ($2,500 each)

- Honor Credit Union
- Horizon Utah Federal Credit Union
- Notre Dame Federal Credit Union

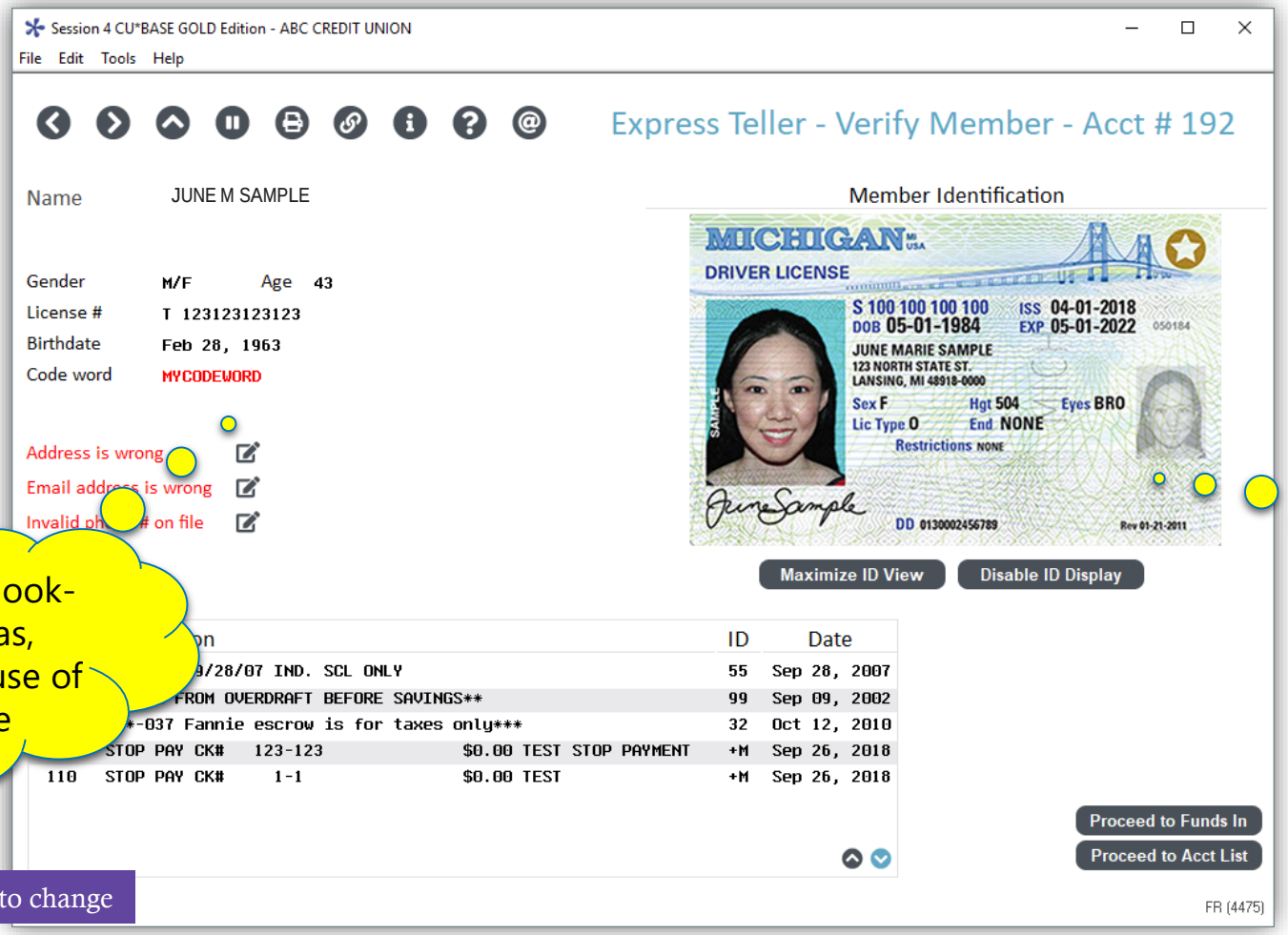
open.cuanswers.com/Teller3P

Conversations with Subject-matter Experts

Teller 3P Project Webinars were held on Thursday February 14, to update interested

Prototyping Express Teller

SOME OF OUR FAVORITE IDEAS THAT ARE HEADING FOR T2 – AND ULTIMATELY FOR T1



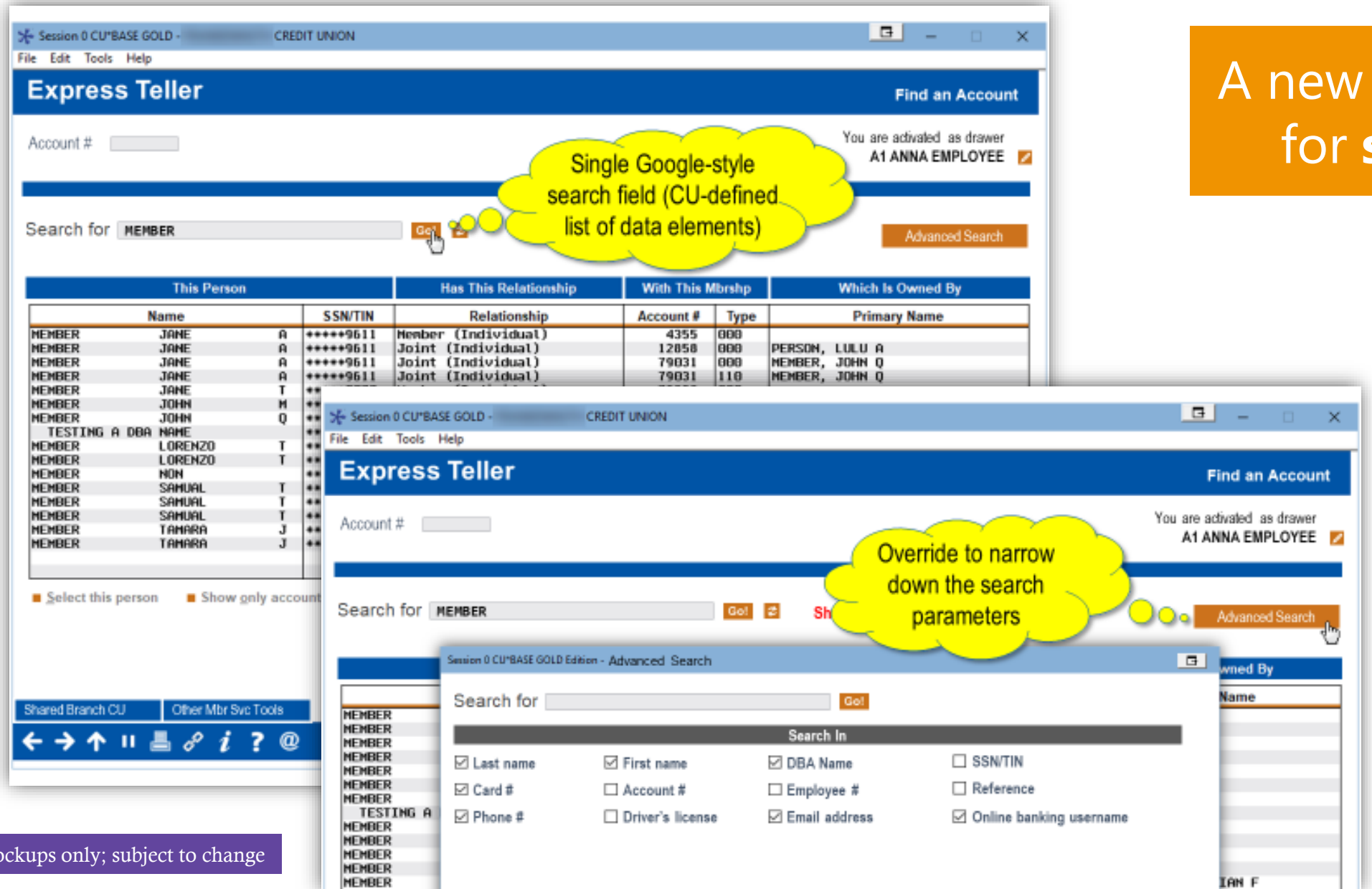
A new standard for **GOLD screens**

Images displayed right on your CU*BASE screen!

Exploring new look-and-feel ideas, making better use of white space

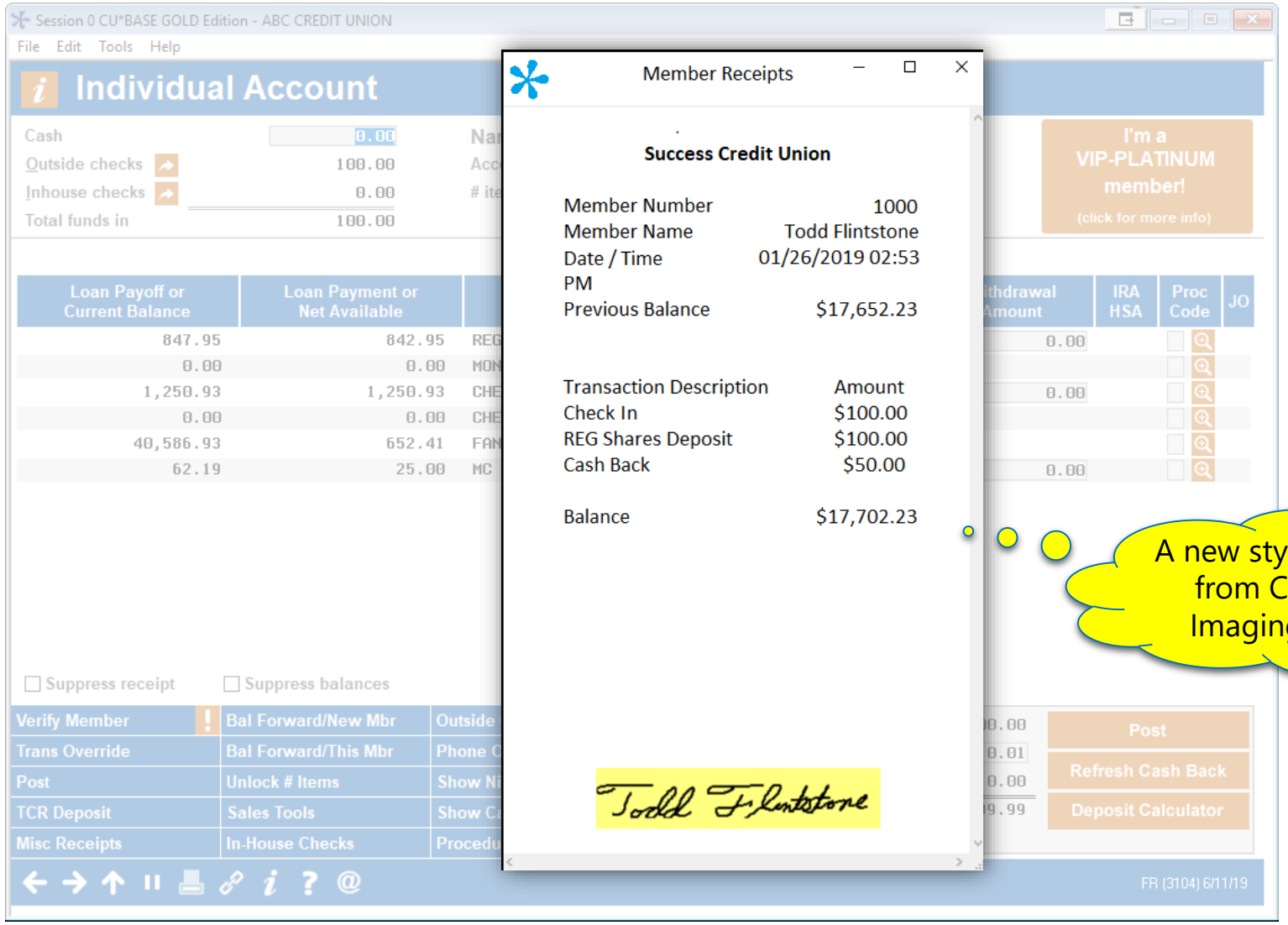
Mockups only; subject to change

Prototyping Express Teller



A new standard for **search**

Mockups only; subject to change



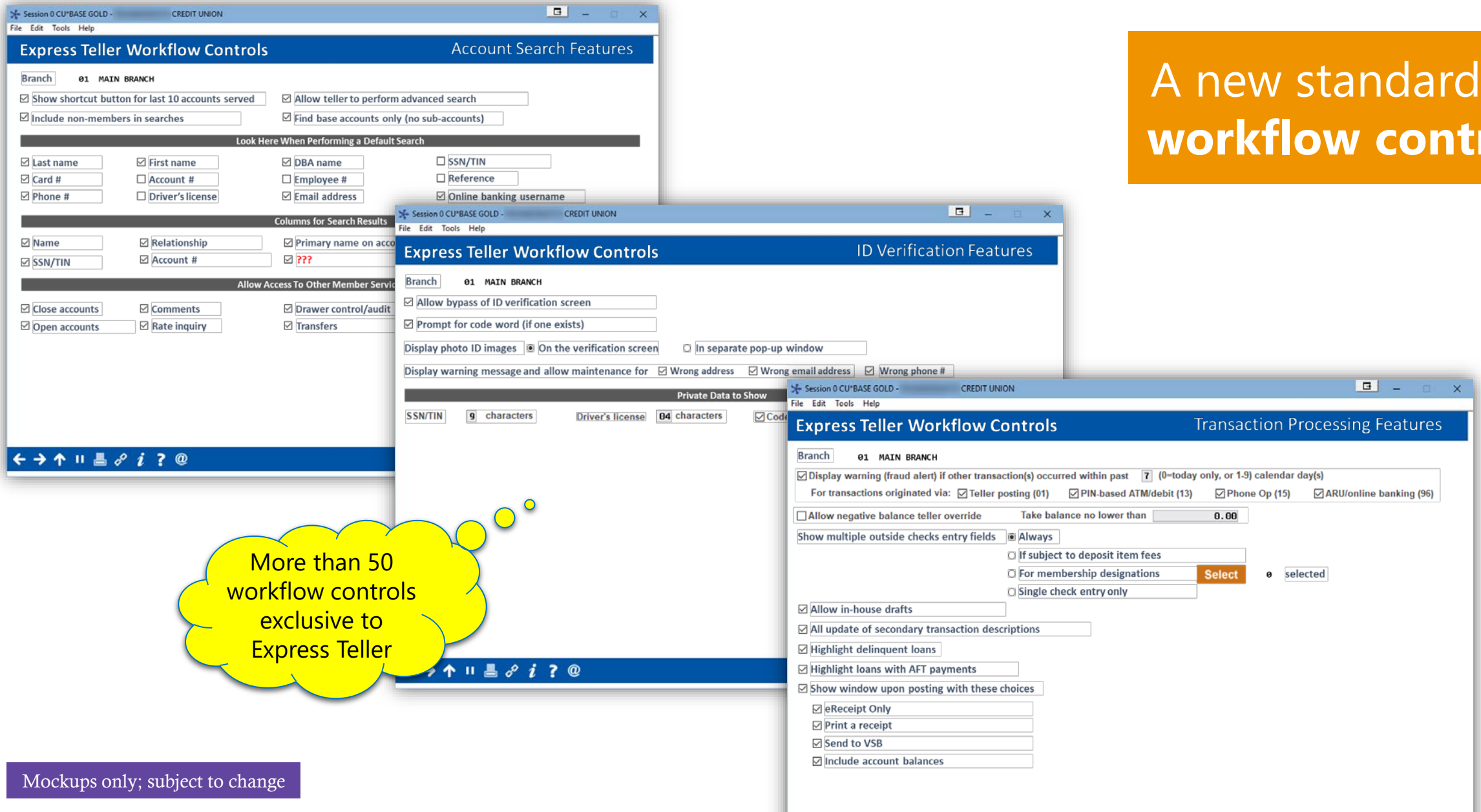
A new standard for **receipts**

A new style of eReceipt from CU*Answers Imaging Solutions

Are we headed towards truly paperless teller lines?

Mockups only; subject to change

Prototyping Express Teller



More than 50 workflow controls exclusive to Express Teller

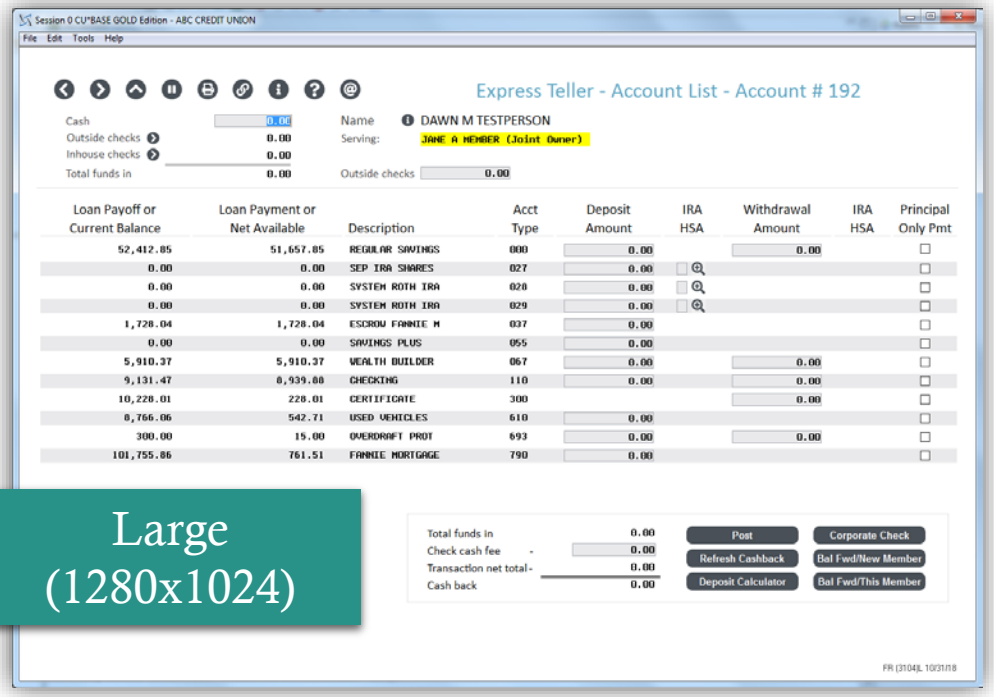
A new standard for **workflow controls**

Mockups only; subject to change

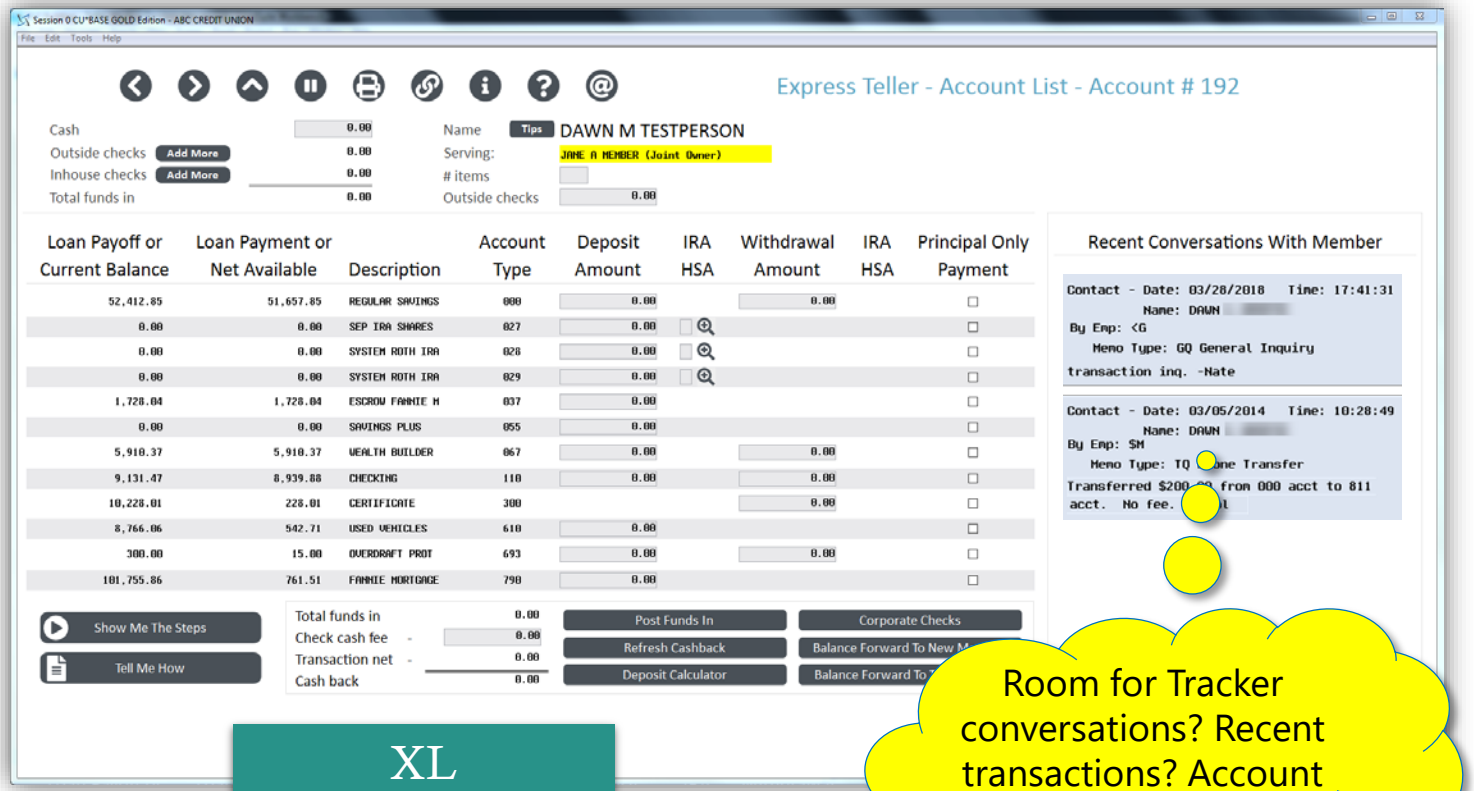
Prototyping Express Teller

Stepping up to today's (and tomorrow's) **screen sizes**

Standard (1024x768)



Large (1280x1024)



XL (1920x1080)

Room for Tracker conversations? Recent transactions? Account comments? Other warnings? Or...?

Mockups only; subject to change

What we've committed to for Express Teller phase 1

WORKING PROTOTYPES BY JUNE 2020!

- New search engine
  - CU-defined defaults, advanced search
- Zoned marketing images on the search screen
  - Graphics upload management engine
- GOLD look-and-feel changes
- Screen sizing (S, L, XL)
- Integrated auto-security
- "Currently Serving" as standard flow
- Photo IDs on the ID verification screen
  - Via API integration to eDOC vault
- New workflow controls
  - Separate from existing controls for S2N
- New host screens and back-end coding for all supported transactions
- Other probables:
  - No more proc codes, fewer features
  - Auto-prompt for drawer activation, quick-change button to choose a drawer
  - Changes to receipt handling