CI J'ANSWERS

2020 CEO Roundtable

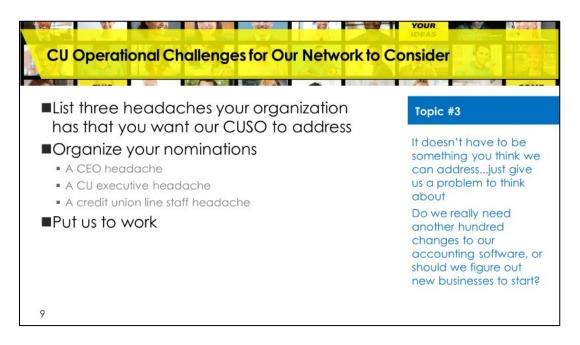
November 11, 2020

Notes from CEO Participants



Topic #3

The conversation:



Participant responses:

Your headache	How you would like to put the CUSO to work
CEO headache	 Data security Setting the expectations to build with tools we have vs. always looking to next: using data As our environment changes how can CUA help me drive data security even harder? Forensics on Fraud at a global level VPN Quality of Service Near time communication Member authentication – Call Center Environments Facilities – Expanding our footprint Teams working with CUA to inspire build over buy Identifying skills of successful people (Email throughput) How can we better protect members' data? More help with preventing/detecting fraud. CUs are not likely to pay for the level of quality ISP equivalent to in-office so staff can work remotely; not cost effective

	 Too many emails. Poor email management; no defined personal approach to emails Improvements to our ability to connect to CU*A remotely; connectivity issues via VPN 1) working on more near time communication; reducing 24-hour turnaround, 2) member phone authentication, 3) adding more space to our current office space footprint available
CU executive headache	 Staff development Profitability to product Being curious and creative in developing solutions that are not overly complicated and are valuable to the consumer Managing micro-awareness to validate requests from CU executives Qualities of CU Executives – Strategic Design Builders Analytical – Do we have enough of these people? Development – Establishing alignment, disciplines, approaches and opinions Marketing Tracking/Optics Digital Title Tracking Platforms – Efficient and Cheap Micro awareness Do you have sufficient executive minds on your team? Most CUs don't have enough builders/project managers Marketing tracking and optics, digital title tracking The ability to determine what's actually happening (micro-awareness) vs. micro-management
Credit union line staff headache	 Productivity – as branch transactions decline what are we doing with this time? Clarity of direction from leaders and understanding of what drives the direction and why Help with stuff I do not want to do Spell check in Trackers