

“A rallying cry for everything we create, write about, or dream about in this next era.”

## Mobile First

MOBILE 5.0

THE NEW LOOK FOR IT'S ME 247



# “Mobile First” is a theme to change our future

FROM EASILY-IDENTIFIED INTERNET SOLUTIONS ALL THE WAY TO THE LOBBY AND LENDER DESKS



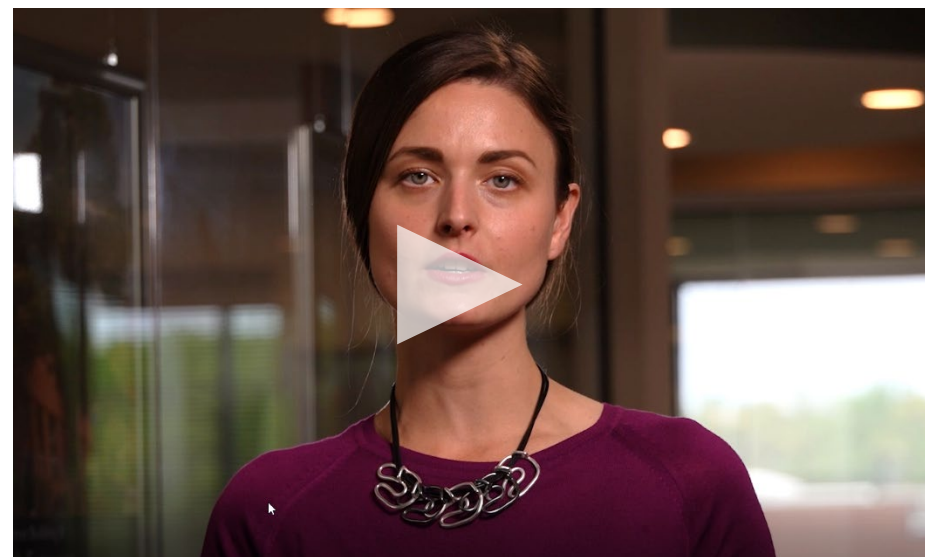
## theme

/THēm/

*noun*

2. an idea that recurs in or pervades a work of art or literature.  
"love and honor are the pivotal themes of the Hornblower books"

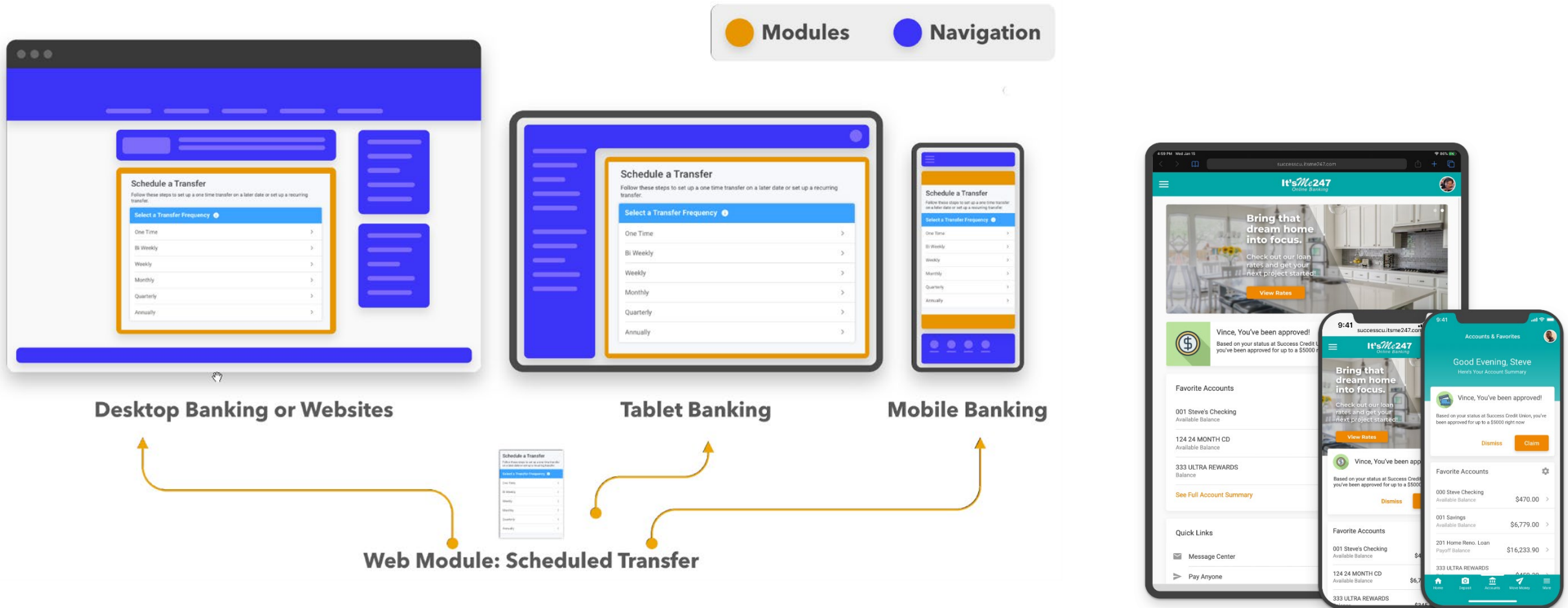
A rallying cry for everything we create, write about, or dream about in this next era



Your members have a fixation on phones; I guess you should, too

# The vision of modules launched a whole new family of desktop and mobile web banking <sup>32</sup>

ONE SOFTWARE, ANY DEVICE



# The vision of modules launched a whole new family of desktop and mobile web banking <sup>33</sup>

## MODULES THAT HAVE BEEN DEVELOPED FOR MOBILE 5.0 AND THE NEW LOOK FOR IT'S ME 247

### STANDALONE (16):

Message Center  
Text Banking  
Contact Us  
Tiered Services  
Vantage Credit Score  
eAlerts  
Download Transaction Activity  
Overdraft Services  
Dividend Interest Summary  
Printed Statement Style Options  
Ballots  
Helpful Links  
Check Ordering - Harland Clark  
Check Ordering - Legacy  
Check Ordering - Deluxe  
**eStatements Module**  
**Form Generator Custom Secure Forms**

### STANDALONE MEMBER PROFILE (8):

Change Username  
Change Password (Basic)  
Change Password (Complex)  
Change Personal Information  
Change Security Question  
Contact Preferences  
Password Change History-Security  
Login History-History

### STANDALONE CU Publisher (2,1):

**CUP: Branch Info**  
**CUP: Assist**  
**CUP: New Mobile Experience Center**

### STANDALONE TRANSFERS (7,1):

Quick Transfer  
Schedule Transfer  
View/Edit Schedule Transfers  
Automatic Check Transfer  
ACH Transaction with OnDemand  
Check Withdrawal  
Cancel Check (Check Stop Payment)  
**LoanPay Express (MagicWrighter)**

### STANDALONE SSO (6,1):

Money Map SSO (aka Money Desktop)  
SavvyMoney SSO (Credit Score)  
Virtual StrongBox SSO  
Augco Dreampoints SSO  
Parkside Perks  
ScoreCard Rewards SSO (CC Rewards)

### STANDALONE BILL PAY & P2P (6):

Payveris native P2P  
Payveris Native Bill Pay  
**iPay Native Bill Pay**  
**Fiserv Native Bill Pay**  
iPay Bill Pay SSO & Native (Legacy)  
COOP Bill Pay SSO (64)

### STANDALONE CONTEXTUAL CREDIT & LOAN OFFERS (4,1):

Skip a Pay  
Modify a Loan Payment (Flex Loans)  
CD Secured Loans  
1 Click Credit Card

### STANDALONE RATE BOARDS (3):

Certificate Rate Board  
Share Rate Board  
Loan Rate Board

### CONTEXTUAL SSO (6):

Vantiv SSO (OTB Card Management)  
FIS SSO (OTB Card Management)  
PSCU SSO (OTB Card Management)  
Everence MyNeighbor Dashboard  
CFS SSO (Investments)

### CONTEXTUAL (7):

Account Details  
Make a Payment  
Account Nicknames  
Print Loan Coupons  
Qualified Dividend Status  
Edit Favorites Accounts  
Edit Favorite Features

## 2020-2021 WEB MODULE QUEUE

### OTHER CONSIDERATIONS:

Autobooks  
Biz Watch for ACH  
1 Click Savings Secured Loans  
1 Click Loan (Unsecured)  
Lock My Card  
Cleared Check Retrieval eDOC  
Max Earnings Sweep??

### CONTEXTUAL:

Debit Card Round Ups

### DHD CONSIDERATIONS

POPiO (Standalone - API)  
ClickSwitch (Standalone SSO)  
Refer-A-Friend (Standalone - API)

### LOAN APP MODULES:

Personal Loan  
Credit Card  
Student Loan  
Boat & RV Loan Loan  
ATV Snowmobile Loan  
Home Equity Loan  
Second Mortgage  
Auto Loan  
Motorcycle Loan

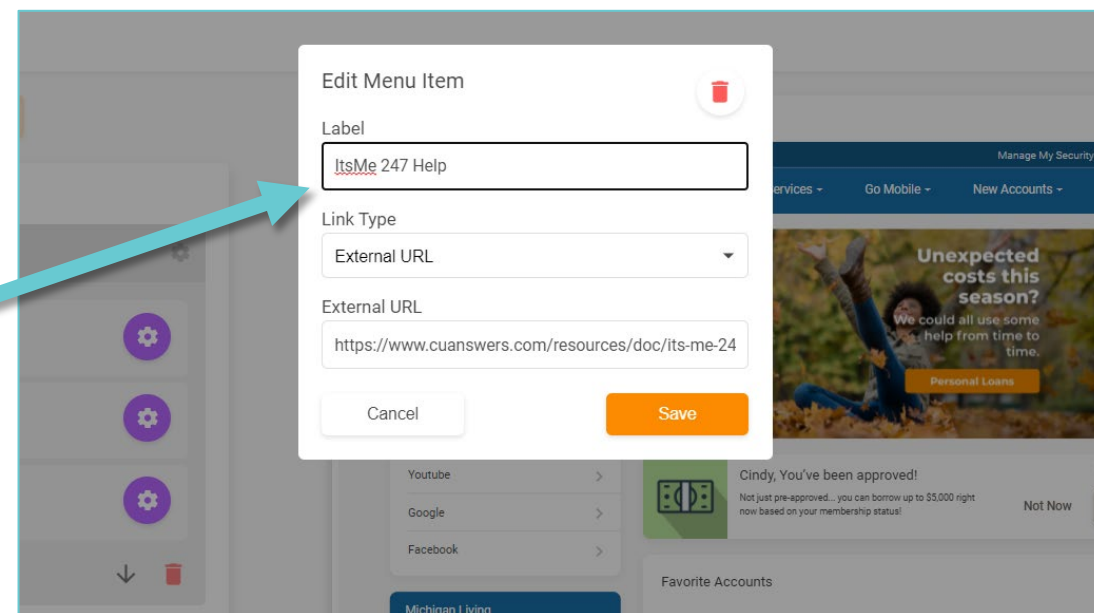
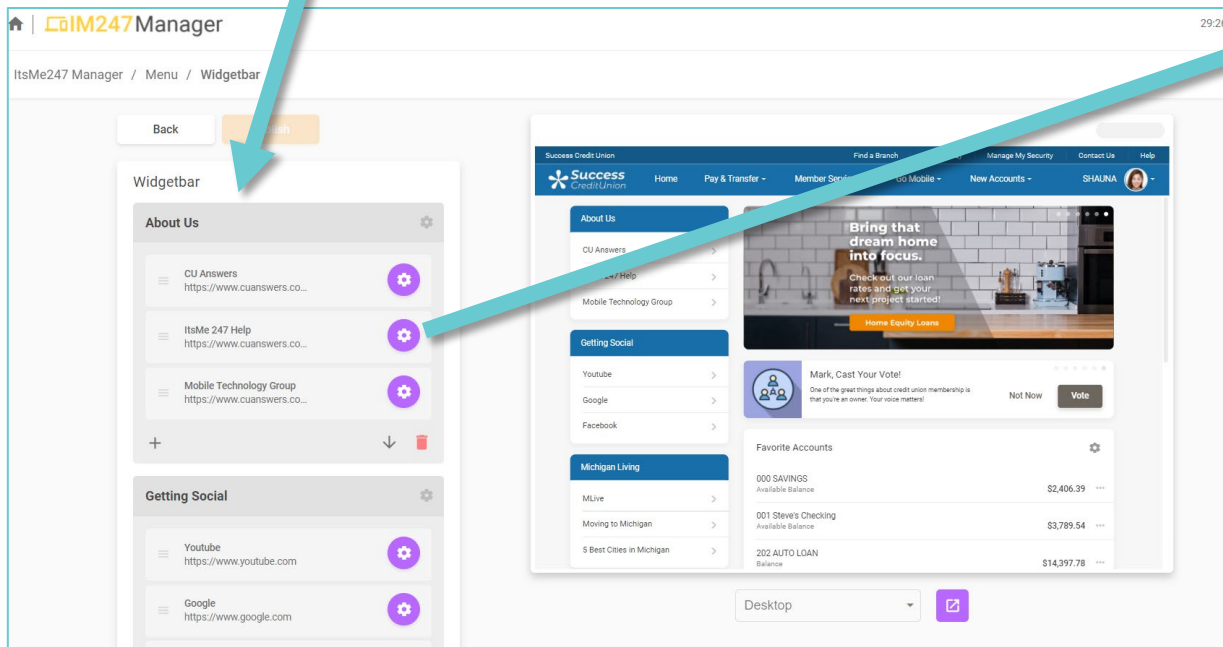
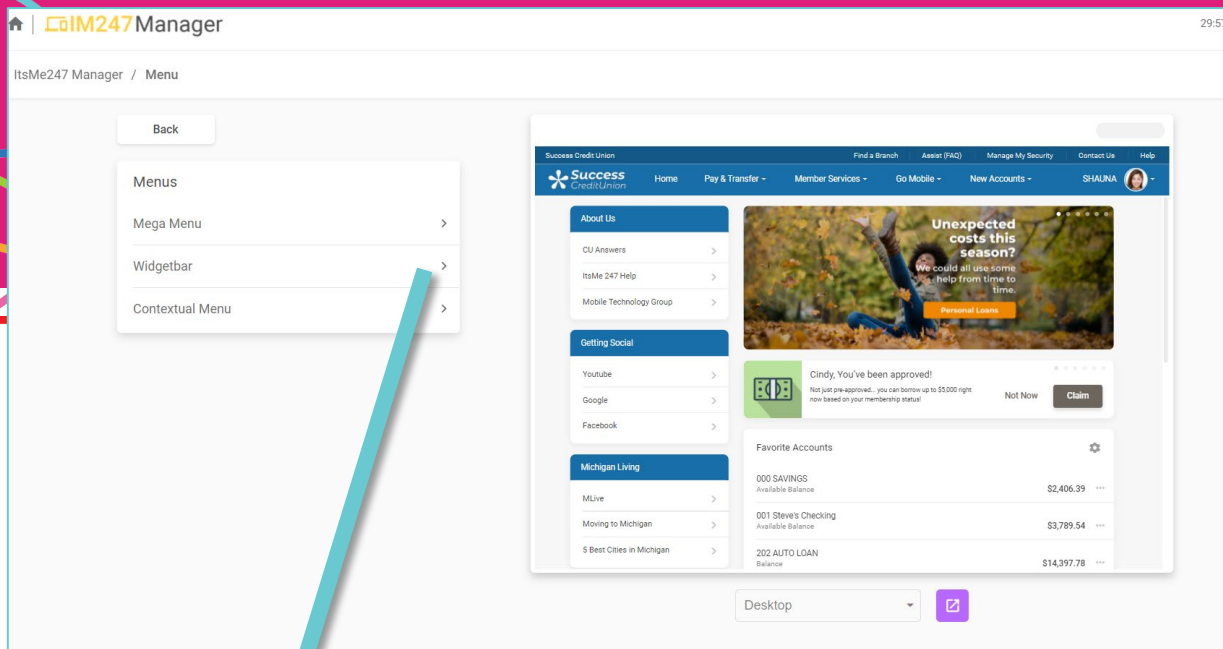
### PIB MODULES:

(Mockups Ready for Review)

What is PIB?  
Activity Log  
Disable PIB Access  
Check Services  
Geographic Restrictions  
New Accounts & Loans  
Personal Account Information  
Registered Devices  
Sending Money  
Time & Date Restrictions  
Transfers & Deposits

● Ready ● Currently in Development ● Currently in UI Design ● In Prototype

# The missing piece: a vision of click-and-drag navigation design



Designed not only for CU\*Answers:  
CU Publisher will release the  
designer in YOU

# CU Publisher will be at the core of almost unlimited options for CU solutions

IN A WORLD OF UNIQUE MEMBER EXPERIENCES, LOOK AND FEEL MIGHT DEFINE SUCCESS

70%

Will use as designed by CU\*Answers

Our most aggressively-priced and carefree option

20%

Will seek out designers to customize

Fees *a la carte* based on chosen designer

10%

Will become designers and power users

CU Publisher license fees

100%  CUPublisher

CUs must adopt a manufacturer's perspective to truly earn from being an internet retailer



If CUs apply themselves,  
these numbers might be  
different in just a few years

**10%** Use as designed

**40%** Find a designer

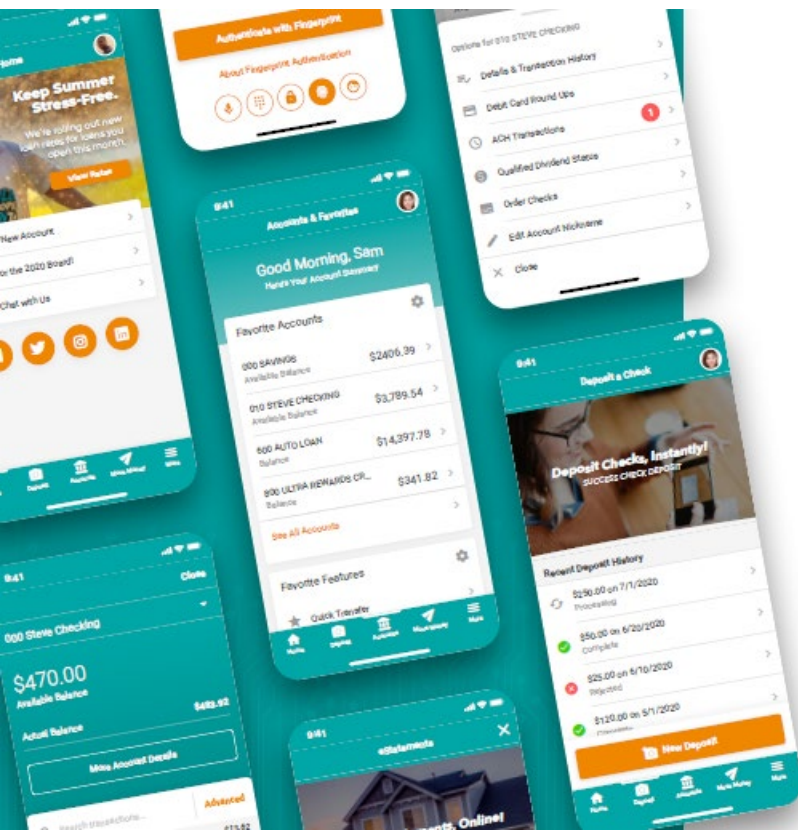
**50%** Become a designer

# Mobile 5.0 is the best example yet of the power of CU Publisher

MTG ENLISTS CREDIT UNIONS TO JOIN US IN DEVELOPING NEW SOLUTIONS, IN A NEW WAY

## Mobile 5.0

Our Biggest Mobile App Update...Ever



- ➔ Our biggest update so far
- ➔ Entirely new foundation
- ➔ 70+ mobile web modules
- ➔ ⚙️ CU Publisher 📱 Mobile Manager
- ➔ Native and customizable navigation
- ➔ Native member messages 1.0
- ➔ Native account summaries
- ➔ Native Jump
- ➔ RDC improvements
- ➔ Goodbye, mobile web! *(well, not really)*

[open.cuanswers.com/Mobile5](https://open.cuanswers.com/Mobile5)

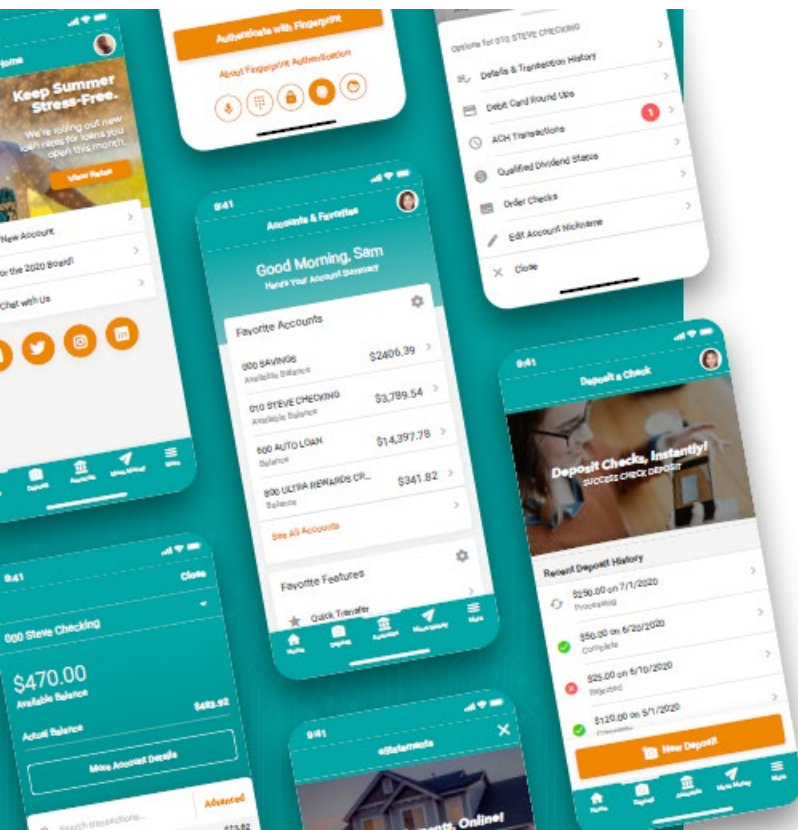


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## Mobile 5.0

Our Biggest Mobile App Update...Ever



- ➔ More effective than APIs, modules have redefined the way designers will configure unique solutions
- ➔ Mobile 5.0 relies on new CU Publisher capabilities to configure navigation approaches
- ➔ Mobile 5.0 was the catalyst to a reset for our **It's Me 247** suite and where it goes from here

 **Mobile Manager**

[open.cuanswers.com/Mobile5](https://open.cuanswers.com/Mobile5)

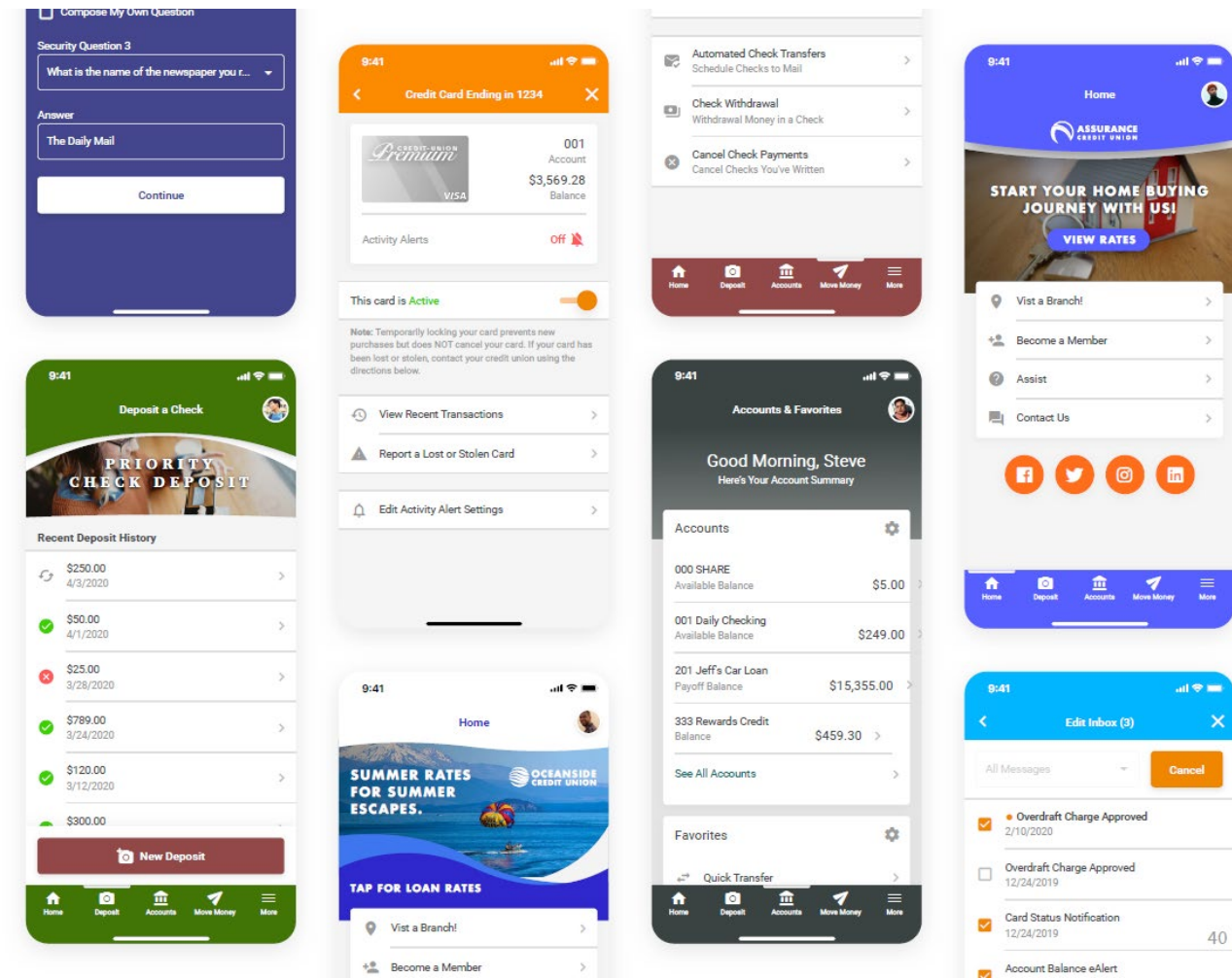
# The most intense software project in our history

39

FOR YEARS, CUS HAVE SAID THEY WANT MORE CREATIVE CONTROL OVER THEIR INTERNET SOLUTIONS

- ➡ This will do it! But you'll need to dig in
- ➡ You'll need to assign a coordinator to work with MTG
- ➡ You may want to assign a designer to learn how to promote your own version of mobile apps

[open.cuanswers.com/Mobile5](https://open.cuanswers.com/Mobile5)



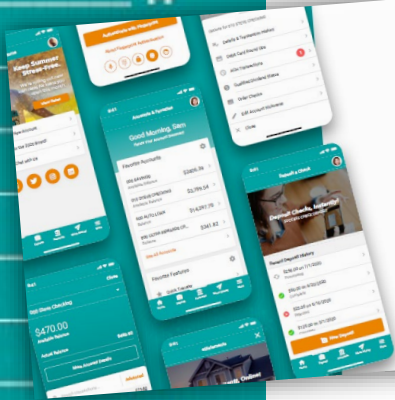
# Designed for active mobile program managers and the designer's heart

YOU CAN'T LEARN IT FROM A HIGH-LEVEL OVERVIEW...YOU HAVE TO DIG IN

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Master Navigation	1
Home Tab	3
Accounts Tab	5
Move Money Tab	12
More Tab	14
Mobile Check Deposit	
Onboarding for Members	
Authentication Updates	
Native Modules	
Introducing Mobile First Web Modules	
CU Publisher Mobile Manager	

CU\*Answers | Mobile Technologies Group



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CU\*ANSWERS STORESOLUTIONSFREE SERVICESMY ACCOUNTBACK TO CU\*ANSWERS

Home > Internet Retailer Support Center Store > Mobile Options > Launch Mobile App 5.0 Annual Update

# Launch Mobile App 5.0

## Annual Update

\$250.00 – \$500.00

Mobile App 5.0 is available for credit unions and contains a complete redesign and updated look of the mobile app. Mobile App 5.0 gives members the option to personalize their accounts, includes a refreshed navigation, a new accounts dashboard, a new RDC process, and much more. [View the brochure](#) to learn more.

Once your order is placed, CU\*Answers will contact the credit union with a staff testing date, and next steps in launching the update for your credit union.

Systems [Clear](#)

\$500.00

open.cuanswers.com/Mobile5

# Mobile 5.0 Release Update

THERE'S AN ARMY AT WORK HERE, AND CUS ARE TAKING CONTROL OVER THE MARCHING ORDERS

➡ **14** CUs are live in Apple & Android app stores

➡ 2 CUs pending with Apple

➡ **102** CUs in staff testing

➡ 700+ Android staff testers

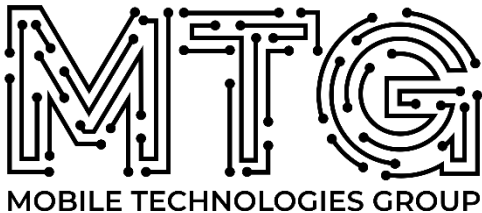
➡ 1,000+ Apple staff testers

➡ **7** newly converting CUs will deploy direct to Mobile 5.0

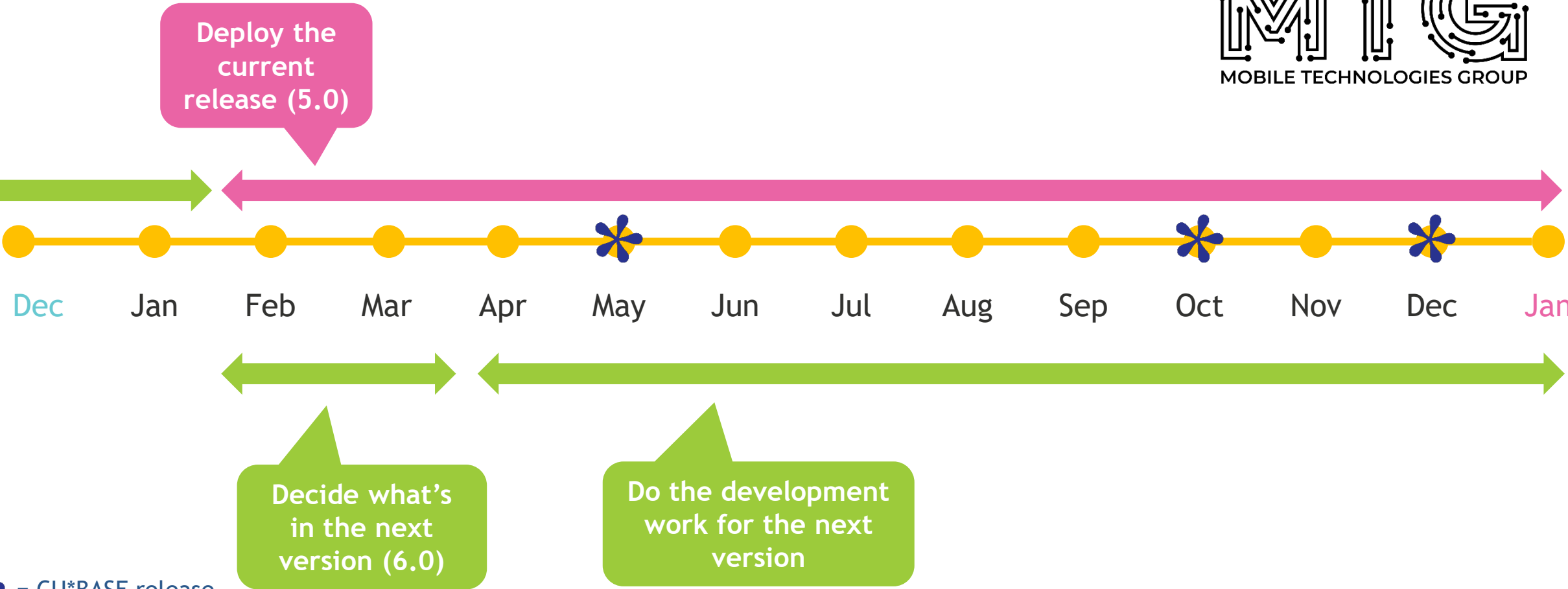
The new jump module will be available for staff testing by early July

[open.cuanswers.com/Mobile5](https://open.cuanswers.com/Mobile5)

# MTG mobile app development



AN ANNUAL WASH-RINSE-REPEAT ROUTINE





# Mobile 6.0 is only 9 months away

SO WHAT'S BEING PLANNED FOR THE NEXT UPDATE?

## Mobile 6

*Scope: 3-4 Months*

- Xtend Chat (Bold 360)
- RDC Auto Enrollment (CU\*BASE)
- Card Controls Enhancements
- MACO Enrollment Prompts
- Custom App Store Screenshots
- Module Builder Support

*Considering the timeline and scope of the RDC Enrollment project, Mobile 6 needs to be fairly light weight*

- ➡ Is your organization ready to enhance your mobile program once a year?
  - ➡ Will you build a factory to do it?
  - ➡ Can you be Apple and Android, and get your marketplace ready for the next big thing?
  - ➡ Are you going to use our version of the next big thing, or be a designer and tweak your own?
- ➡ Are you ready to go beyond being just a user of a tool, to being a true internet channel retailer?