

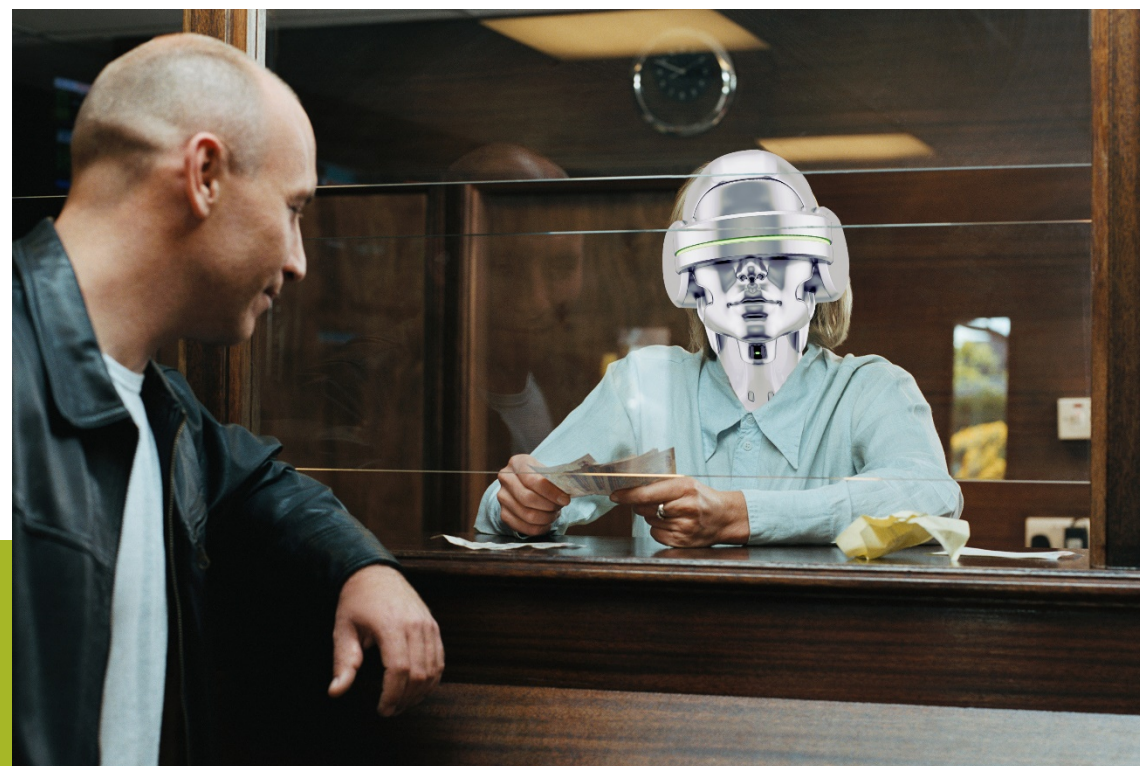
T2

TAKING A NEW TELLER APPROACH TO THE FUTURE

Teller P3: Developing Three New Platforms for
CU*BASE Teller Processing

T2 (KISS) Status Update

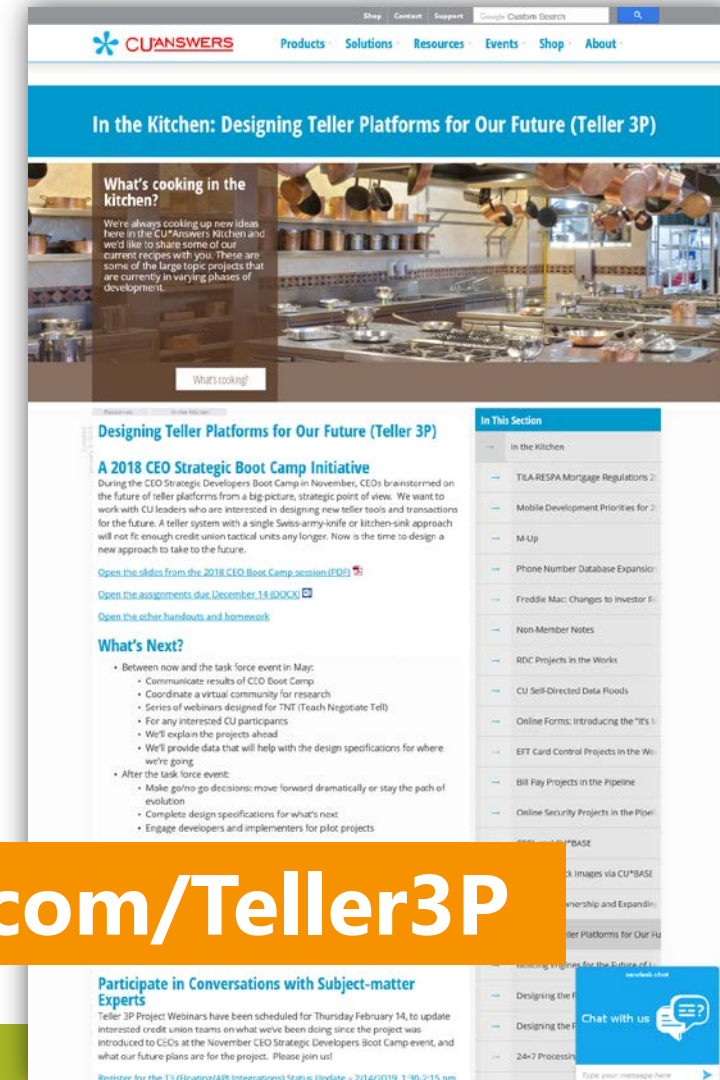
February 14, 2019 – 2:30 p.m. ET



CEO STRATEGIC DEVELOPERS BOOT CAMP SEGMENT B: DESIGNING TELLER PLATFORMS FOR OUR FUTURE

“TELLER 3P” THREE NEW PLATFORMS FOR CU*BASE TELLER PROCESSING

- 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
- Our goal is to envision three distinct teller segments, each with independent approaches:
 1. **Soup-to-nuts** (S2N) – The next generation of our existing comprehensive teller platform
 2. **Basic** (KISS) – Across-the-counter teller tool, streamlined and simplified for today’s teller lines
 3. **Floating** – App for roving tellers, API-based to also support integrations to third-party teller platforms



open.cuanswers.com/Teller3P

RATHER THAN START FROM A “BLANK PAGE”, HERE’S WHAT WE’VE DONE SO FAR

WE STARTED BY SPLITTING THE PROJECT INTO TWO PIECES

■ Brainstormed on what to do with **CU*BASE native code toolsets**

- Formed an internal team of about 10 key leaders from the Programming, Writing, QC, and GOLD development teams
- Declared there are no sacred cows – everything is on the table
- Focused on the KISS platform and on writing new software as the catalyst
- Asked everyone to blue-sky dream and use their specific skills to create some prototype ideas

■ Started market research to build a middleware platform for **third-party teller integrations**

- Prepared data to discuss with CEOs for this week’s session



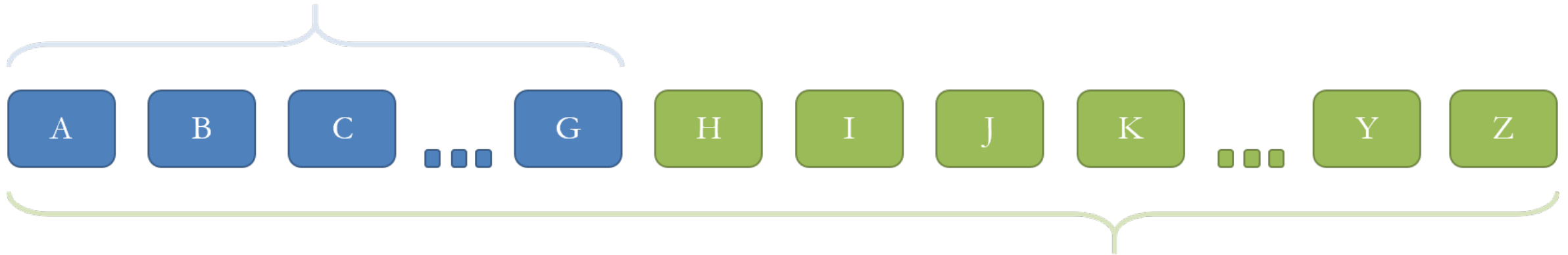
Our focus
for this
session

A VISION FOR TWO TELLER PLATFORMS

TWO INDEPENDENT TOOLS WITH OVERLAPPING FUNCTIONALITY

K.I.S.S. Teller

Controlled by K.I.S.S. Workflow Config

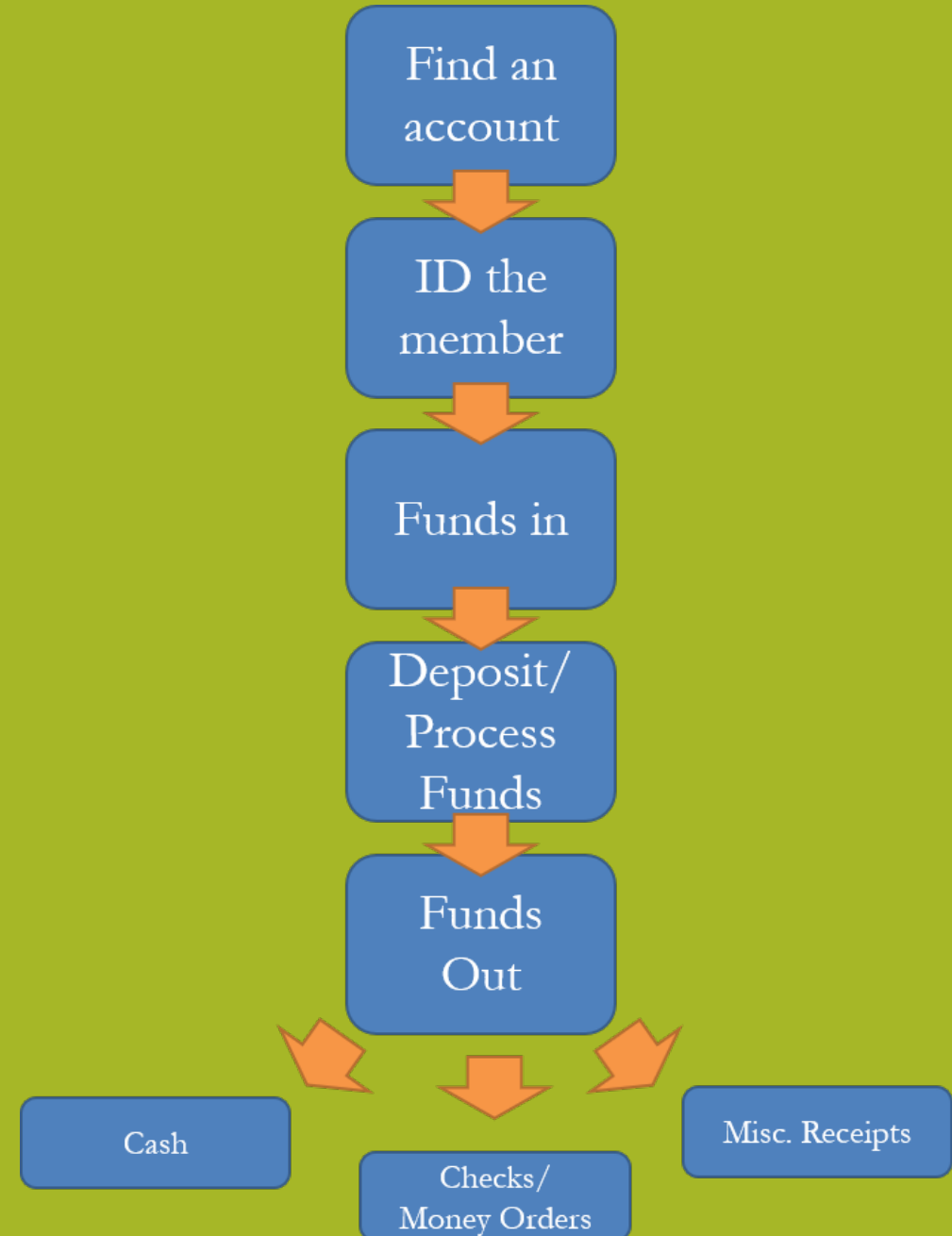


S2N Teller

Controlled by S2N Workflow Config

THE CURRENT TELLER FLOW: BLOCKING IT OUT

HOW CAN WE CREATE THE
BEST VERSIONS OF EACH
MAJOR BLOCK?



EXPRESS TELLER MOCKUPS

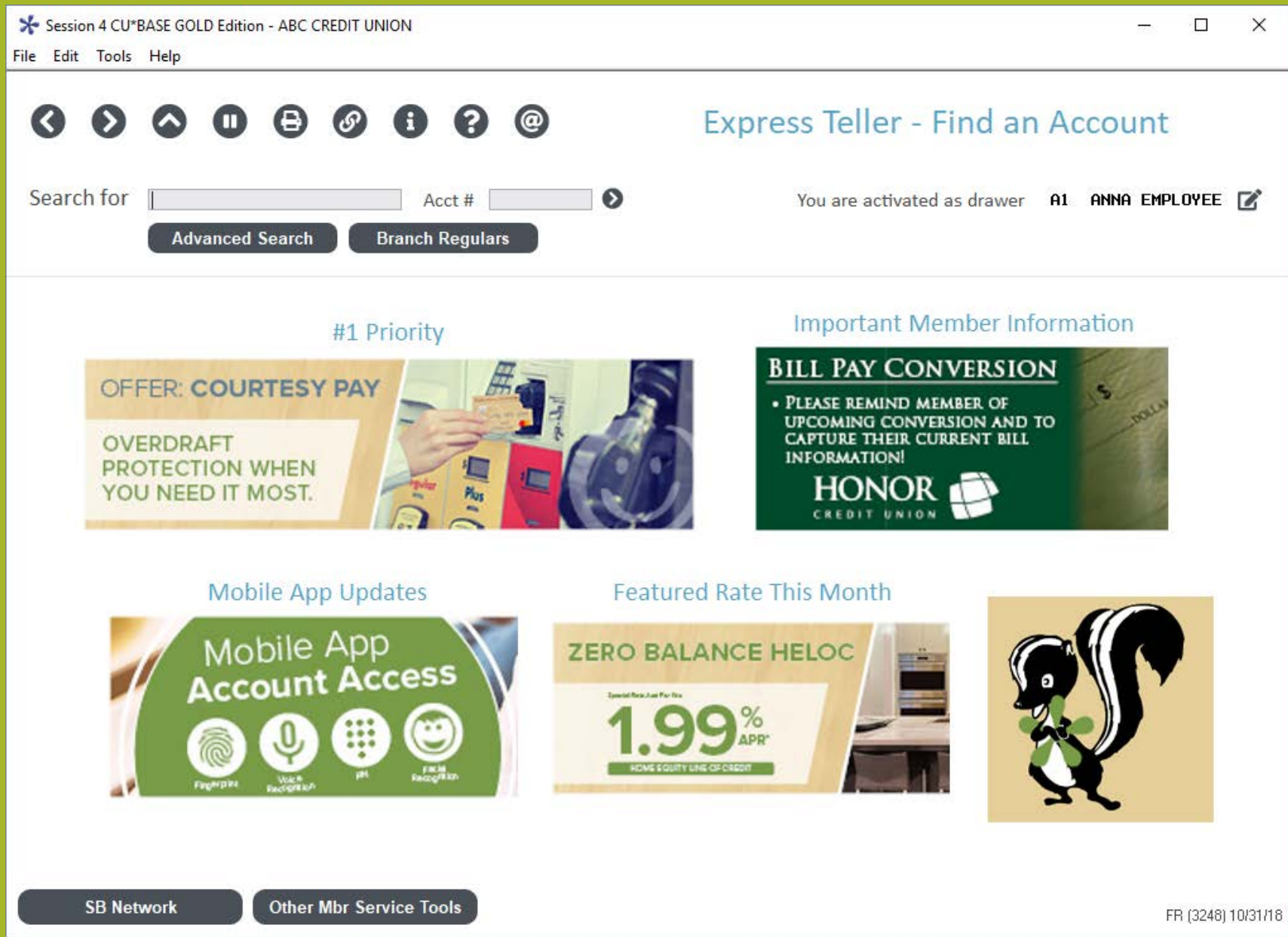
Revised January 9, 2019



Taking a New Teller Approach to the Future
Teller 3P: Developing Three Platforms for CU*BASE Teller Processing

NOW FOR SOME GOLD DEVELOPER RAZZLE DAZZLE

7



Remember these are blue-sky dreaming mockups only!

NOW FOR SOME GOLD DEVELOPER RAZZLE DAZZLE

8

Session 4 CU*BASE GOLD Edition - ABC CREDIT UNION

File Edit Tools Help

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Express Teller - Find an Account

Search for

SMITH

Acct #

>

You are activated as drawer

A1

ANNA EMPLOYEE

✎

Advanced Search

Branch Regulars

This Person			Has This Relationship		w/ This Mbrshp		Which Is Owned By	
Name		SSN/TIN	Relationship	Account #	Type	Primary Name		
SMITH	ABBEY	A *****2322	Beneficiary (Individual)	48651	000	SMITH, SCOTT C	👤	\$ == 📄
SMITH	ABBEY	A *****2322	Beneficiary (Individual)	48651	061	SMITH, SCOTT C	👤	\$ == 📄
SMITH	ABBEY	A *****2322	Beneficiary (Individual)	48651	110	SMITH, SCOTT C	👤	\$ == 📄
SMITH	ABBEY	A *****2322	Beneficiary (Individual)	56899	000	SMITH, GRETCHEN A	👤	\$ == 📄
SMITH	ABBEY	M *****2173	Non-member	NonMbr			👤	\$ == 📄
SMITH	ABSALOM	*****8722	Member (Individual)	7038	000		👤	\$ == 📄
SMITH	ABSALOM	*****8722	Joint (Individual)	40284	000	TONEY, TY ANNA C	👤	\$ == 📄
SMITH	ADAM	*****6324	Non-member	NonMbr			👤	\$ == 📄
SMITH	ADAM	C *****4217	Member (Individual)	60780	000		👤	\$ == 📄
SMITH	ADAM	G *****2429	Non-member	NonMbr			👤	\$ == 📄
SMITH	ADAM	J *****3167	Member (Individual)	59075	000		👤	\$ == 📄
SMITH	ADAM	J *****4718	Member (Individual)	71435	000		👤	\$ == 📄
SMITH	ADDISYN	F *****9580	Beneficiary (Individual)	65755	000	SMITH, FRANK J	👤	\$ == 📄
SMITH	ADDISYN	F *****9580	Member (Individual)	74088	000		👤	\$ == 📄

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SB Network

Other Mbr Service Tools

FR (3248) 10/31/18

Remember these are blue-sky dreaming mockups only!

NOW FOR SOME GOLD DEVELOPER RAZZLE DAZZLE

9

Session 4 CU*BASE GOLD Edition - ABC CREDIT UNION

File Edit Tools Help

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Express Teller - Find an Account

Search for

Acct #

>

You are activated as drawer A1 ANNA EMPLOYEE

Advanced Search

Branch Regulars

This Person			Has This Relationship		w/ This Mbrshp		Which Is Owned By
Name		SSN/TIN	Relationship	Account #	Type	Primary Name	
SMITH	ABBEY	A *****2322	Beneficiary (Individual)	48651	000	SMITH, SCOTT C	
SMITH	ABBEY	A *****2322	Beneficiary (Individual)	48651	061	SMITH, SCOTT C	
SMITH	ABBEY	A *****2322	Beneficiary (Individual)	48651	110	SMITH, SCOTT C	
SMITH	ABBEY	A *****2322	Beneficiary (Individual)	56899	000	SMITH, GRETCHEN A	
SMITH	ABBEY	M *****2173	Non-member	NonMbr			
SMITH	ABSALOM	*****8722	Member (Individual)	7038	000		
SMITH	ABSALOM	*****8722	Joint (Individual)	40284	000	TONEY, TY ANNA C	
SMITH	ADAM	*****6324	Non-member	NonMbr			
SMITH	ADAM	*****4317	Member (Individual)	60780	000		
SMITH	ADAM		Non-member	NonMbr			
SMITH	ADAM		Member (Individual)	59075	000		
SMITH	ADAM		Member (Individual)	71435	000		
SMITH	ADDISY		Beneficiary (Individual)	65755	000	SMITH, FRANK J	
SMITH	ADDISY		Member (Individual)	74088	000		

Other Mbr Service Tools

Close Accounts

Comments

Device/Workstation Config

Drawer Control/Audit

Open Accounts

Rate Inquiry

Transaction Description

Transfers

SB Network

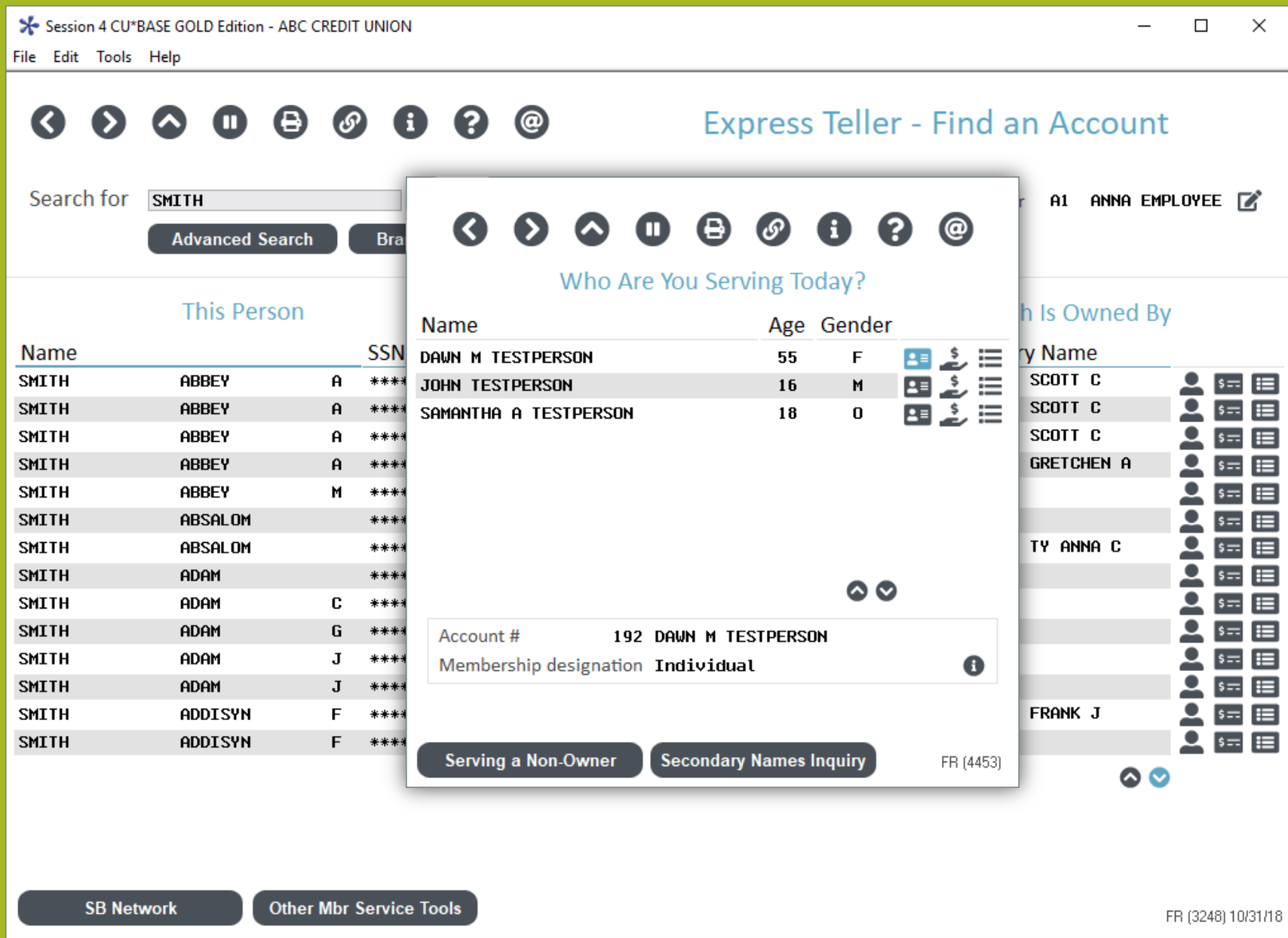
Other Mbr Service Tools

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10



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NOW FOR SOME GOLD DEVELOPER RAZZLE DAZZLE

11

Session 4 CU*BASE GOLD Edition - ABC CREDIT UNION

File Edit Tools Help

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Express Teller - Verify Member - Acct # 192

NameDAWN M TESTPERSON

Member Identification

GenderM/FAge43

License #T 123123123123

BirthdateFeb 28, 1963

Code wordMYCODEWORD

Address is wrong✎


Email address is wrong✎

Invalid phone # on file✎

MICHIGANMI USA

DRIVER LICENSE

SAMPLE



June Sample

S 100 100 100 100

DOB 05-01-1984

ISS 04-01-2018

EXP 05-01-2022

050184

JUNE MARIE SAMPLE

123 NORTH STATE ST.

LANSING, MI 48918-0000

Sex F

Hgt 504

Eyes BRO

Lic Type O

End NONE

Restrictions NONE

DD 0130002456789

Rev 01-21-2011

Maximize ID View

Disable ID Display

Type	Description	ID	Date
000	O E C P 09/28/07 IND. SCL ONLY	55	Sep 28, 2007
000	**TAKE FROM OVERDRAFT BEFORE SAVINGS**	99	Sep 09, 2002
000	***-037 Fannie escrow is for taxes only***	32	Oct 12, 2010
110	STOP PAY CK# 123-123 \$0.00 TEST STOP PAYMENT	+M	Sep 26, 2018
110	STOP PAY CK# 1-1 \$0.00 TEST	+M	Sep 26, 2018

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Proceed to Funds In

Proceed to Acct List

FR (4475)

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NOW FOR SOME GOLD DEVELOPER RAZZLE DAZZLE

12

Session 4 CU*BASE GOLD - ABC CREDIT UNION

File Edit Tools Help

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Express Teller - Funds In - Acct # 192

Cash In

Cash

0.00

Total funds in

0.00

Post Cash Back

Check cash fee

0.00

Account List for Dep/WD

Cash back

0.00

Misc. Advances

Post Code

Amount

Member Receipt Desc

🔍

0.00

🔍

0.00

🔍

0.00

Total advances

0.00

Outside Checks

Check Amount

Days

i

Type

0.00

0.00

0.00

0.00

Total checks

0.00

In-house Checks

Check #

Amount

Account #

0.00

0.00

0.00

0.00

Total checks

0.00

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FR (6367) 10/31/18

Remember these are blue-sky dreaming mockups only!

NOW FOR SOME GOLD DEVELOPER RAZZLE DAZZLE

13

Session 4 CU*BASE GOLD Edition - ABC CREDIT UNION

FileEditToolsHelp

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Express Teller - Account List - Acct # 192

Cash

0.00

Outside checks

>

0.00

Inhouse checks

>

0.00

Total funds in

0.00

Name

DAWN M TESTPERSON

Serving:

JANE A MEMBER (Joint Owner)

Outside checks

0.00

Loan Payoff or Current Balance	Loan Payment or Net Available	Description	Acct Type	Deposit Amount	IRA HSA	Withdrawal Amount	IRA HSA	Principal Only
52,412.85	51,657.85	REGULAR SAVINGS	000	0.00		0.00		<input type="checkbox"/>
0.00	0.00	SEP IRA SHARES	027	0.00	<input type="checkbox"/> 🔍			<input type="checkbox"/>
0.00	0.00	SYSTEM ROTH IRA	028	0.00	<input type="checkbox"/> 🔍			<input type="checkbox"/>
0.00	0.00	SYSTEM ROTH IRA	029	0.00	<input type="checkbox"/> 🔍			<input type="checkbox"/>
1,728.04	1,728.04	ESCROW FANNIE M	037	0.00				<input type="checkbox"/>
0.00	0.00	SAVINGS PLUS	055	0.00				<input type="checkbox"/>
5,910.37	5,910.37	WEALTH BUILDER	067	0.00		0.00		<input type="checkbox"/>
9,131.47	8,939.88	CHECKING	110	0.00		0.00		<input type="checkbox"/>
10,228.01	228.01	CERTIFICATE	300			0.00		<input type="checkbox"/>
8,766.06	542.71	USED VEHICLES	610	0.00				<input type="checkbox"/>
300.00	15.00	OVERDRAFT PROT	693	0.00		0.00		<input type="checkbox"/>
101,755.86	761.51	FANNIE MORTGAGE	790	0.00				<input type="checkbox"/>

Total funds in

0.00

Check cash fee

-

0.00

Transaction net total-

0.00

Cash back

0.00

Post

Corporate Check

Refresh Cashback

Bal Fwd/New Member

Deposit Calculator

Bal Fwd/This Member

FR (3104) 10/31/18

Remember these are blue-sky dreaming mockups only!

NOW FOR SOME GOLD DEVELOPER RAZZLE DAZZLE

14

Session 4 CU*BASE GOLD Edition - ABC CREDIT UNION

File Edit Tools Help

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Express Teller - Account List - Acct # 192

Cash

0.00

Outside checks

>

0.00

Inhouse checks

>

0.00

Total funds in

0.00

Name

DAWN M TESTPERSON

Serving:

JANE A MEMBER (Joint Owner)

Outside checks

0.00

Loan Payoff or Current Balance	Loan Payment or Net Available	Description	Acct Type	Deposit Amount	IRA HSA	Withdrawal Amount	IRA HSA	Principal Only
52,412.85	51,657.85	REGULAR SAVINGS	000	0.00		0.00		<input type="checkbox"/>
0.00	0.00	SEP IRA SHARES	027	0.00	<input type="checkbox"/>			<input type="checkbox"/>
0.00	0.00	SYSTEM ROTH IRA	028	0.00	<input type="checkbox"/>			<input type="checkbox"/>
0.00	0.00	SYSTEM ROTH IRA	029	0.00	<input type="checkbox"/>			<input type="checkbox"/>
1,728.04	1,728.04	ESCROW FANNIE M	037	0.00				<input type="checkbox"/>
0.00	0.00	SAVINGS PLUS	055	0.00				<input type="checkbox"/>
5,910.37	5,910.37	WEALTH BUILDER	067	0.00		0.00		<input type="checkbox"/>
9,131.47	8,939.88	CHECKING	110	0.00				
10,228.01	228.01	CERTIFICATE	300					
8,766.06	542.71	USED VEHICLES	610	0.00				
300.00	15.00	OVERDRAFT PROT	693	0.00				
101,755.86	761.51	FANNIE MORTGAGE	790	0.00				

Confirm Post

Print Receipt

Suppress Receipt

Total funds in

0.00

Check cash fee

-

0.00

Transaction net total-

0.00

Cash back

0.00

Post

Corporate Check

Refresh Cashback

Bal Fwd/New Member

Deposit Calculator

Bal Fwd/This Member

FR (3104) 10/31/18

Remember these are blue-sky dreaming mockups only!

NOW FOR SOME GOLD DEVELOPER RAZZLE DAZZLE

15

Session 4 CUPBASE GOLD Edition - ABC CREDIT UNION

File Edit Tools Help

Express Teller - Account List - Acct # 192

Cash: 300.00

Outside checks: 0.00

Inhouse checks: 0.00

Total funds in: 0.00

Name: DAWN M TESTPERSON

Serving: JANE A MEMBER (Joint Owner)

Outside checks: 0.00

Loan Payoff or Current Balance	Loan Payment or Net Available	Description	Acct Type	Deposit Amount	IRA HSA	Withdrawal Amount	IRA HSA	Principal Only
52,412.85	51,657.85	REGULAR SAVINGS	000	0.00		0.00		<input type="checkbox"/>
0.00	0.00	SEP IRA SHARES	027	0.00	<input type="checkbox"/>			<input type="checkbox"/>
0.00	0.00	SYSTEM ROTH IRA	028	0.00	<input type="checkbox"/>			<input type="checkbox"/>
0.00	0.00	SYSTEM ROTH IRA	029	0.00	<input type="checkbox"/>			<input type="checkbox"/>
1,728.04	1,728.04	ESCROW FANNIE H	037	0.00				<input type="checkbox"/>
0.00	0.00	SAVINGS PLUS	055	0.00				<input type="checkbox"/>
5,910.37	5,910.37	WEALTH BUILDER	067	0.00		0.00		<input type="checkbox"/>
9,131.47	8,939.88	CHECKING	110	0.00		0.00		<input type="checkbox"/>
10,228.01	228.01	CERTIFICATE	300	0.00		0.00		<input type="checkbox"/>
8,766.06	542.71	USED VEHICLES	610	0.00				<input type="checkbox"/>
		OVERDRAFT PROT	693	0.00		0.00		<input type="checkbox"/>
		FANNIE MORTGAGE	790	0.00				<input type="checkbox"/>

Transaction net total: 0.00

Cash back: 0.00

Post

Corporate Check

Refresh Cashback

Get Funds/New Member

Deposit Calculator

Get Fund/This Member

PR (2104) 10/31/18

Standard

Session 0 CUPBASE GOLD Edition - ABC CREDIT UNION

File Edit Tools Help

Express Teller - Account List - Account # 192

Cash: 0.00

Outside checks: 0.00

Inhouse checks: 0.00

Total funds in: 0.00

Name: DAWN M TESTPERSON

Serving: JANE A MEMBER (Joint Owner)

Outside checks: 0.00

Loan Payoff or Current Balance	Loan Payment or Net Available	Description	Acct Type	Deposit Amount	IRA HSA	Withdrawal Amount	IRA HSA	Principal Only
52,412.85	51,657.85	REGULAR SAVINGS	000	0.00		0.00		<input type="checkbox"/>
0.00	0.00	SEP IRA SHARES	027	0.00	<input type="checkbox"/>			<input type="checkbox"/>
0.00	0.00	SYSTEM ROTH IRA	028	0.00	<input type="checkbox"/>			<input type="checkbox"/>
0.00	0.00	SYSTEM ROTH IRA	029	0.00	<input type="checkbox"/>			<input type="checkbox"/>
1,728.04	1,728.04	ESCROW FANNIE H	037	0.00				<input type="checkbox"/>
0.00	0.00	SAVINGS PLUS	055	0.00				<input type="checkbox"/>
5,910.37	5,910.37	WEALTH BUILDER	067	0.00		0.00		<input type="checkbox"/>
9,131.47	8,939.88	CHECKING	110	0.00		0.00		<input type="checkbox"/>
10,228.01	228.01	CERTIFICATE	300	0.00		0.00		<input type="checkbox"/>
8,766.06	542.71	USED VEHICLES	610	0.00				<input type="checkbox"/>
300.00	15.00	OVERDRAFT PROT	693	0.00		0.00		<input type="checkbox"/>
101,755.86	761.51	FANNIE MORTGAGE	790	0.00				<input type="checkbox"/>

Total funds in: 0.00

Check cash fee: 0.00

Transaction net total: 0.00

Cash back: 0.00

Post

Corporate Check

Refresh Cashback

Bal Fwd/New Member

Deposit Calculator

Bal Fwd/This Member

PR (2104) 10/31/18

Large

Session 0 CUPBASE GOLD Edition - ABC CREDIT UNION

File Edit Tools Help

Express Teller - Account List - Account # 192

Cash: 0.00

Outside checks: 0.00

Inhouse checks: 0.00

Total funds in: 0.00

Name: DAWN M TESTPERSON

Serving: JANE A MEMBER (Joint Owner)

items:

Outside checks: 0.00

Loan Payoff or Current Balance	Loan Payment or Net Available	Description	Account Type	Deposit Amount	IRA HSA	Withdrawal Amount	IRA HSA	Principal Only
52,412.85	51,657.85	REGULAR SAVINGS	000	0.00		0.00		<input type="checkbox"/>
0.00	0.00	SEP IRA SHARES	027	0.00	<input type="checkbox"/>			<input type="checkbox"/>
0.00	0.00	SYSTEM ROTH IRA	028	0.00	<input type="checkbox"/>			<input type="checkbox"/>
0.00	0.00	SYSTEM ROTH IRA	029	0.00	<input type="checkbox"/>			<input type="checkbox"/>
1,728.04	1,728.04	ESCROW FANNIE H	037	0.00				<input type="checkbox"/>
0.00	0.00	SAVINGS PLUS	055	0.00				<input type="checkbox"/>
5,910.37	5,910.37	WEALTH BUILDER	067	0.00		0.00		<input type="checkbox"/>
9,131.47	8,939.88	CHECKING	110	0.00		0.00		<input type="checkbox"/>
10,228.01	228.01	CERTIFICATE	300	0.00		0.00		<input type="checkbox"/>
8,766.06	542.71	USED VEHICLES	610	0.00				<input type="checkbox"/>
300.00	15.00	OVERDRAFT PROT	693	0.00		0.00		<input type="checkbox"/>
101,755.86	761.51	FANNIE MORTGAGE	790	0.00				<input type="checkbox"/>

Show Me The Steps

Tell Me How

Total funds in: 0.00

Check cash fee: 0.00

Transaction net: 0.00

Cash back: 0.00

Post Funds In

Corporate Checks

Refresh Cashback

Balance Forward To New Member

Deposit Calculator

Balance Forward To This Member

Recent Conversations With Member

Contact - Date: 03/28/2018 Time: 17:41:31

Name: DAWN

By Exp: <G

Memo Type: GQ General Inquiry

transaction inq. -Nate

Contact - Date: 03/05/2014 Time: 10:28:49

Name: DAWN

By Exp: SM

Memo Type: TQ Phone Transfer

Transferred \$200.00 from 000 acct to 811 acct. No fee. carol

PR (2104) 10/31/18

XL

Remember these are blue-sky dreaming mockups only!

NOW FOR SOME GOLD DEVELOPER RAZZLE DAZZLE

16

Session 0 CU*BASE GOLD Edition - ABC CREDIT UNION

File Edit Tools Help

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Express Teller - Account List - Account # 192

Cash0.00

Outside checks0.00

Inhouse checks0.00

Total funds in0.00

Add More

Add More

NameDAWN M TESTPERSON

Serving:JANE A MEMBER (Joint Owner)

items

Outside checks0.00

Loan Payoff or Current Balance

Loan Payment or Net Available

Description

Account Type

Deposit Amount

IRA HSA

Withdrawal Amount

IRA HSA

Principal Only Payment

52,412.85

51,657.85

REGULAR SAVINGS

000

0.00

0.00

0.00

0.00

SEP IRA SHARES

027

0.00

0.00

0.00

SYSTEM ROTH IRA

028

0.00

0.00

0.00

SYSTEM ROTH IRA

029

0.00

1,728.04

1,728.04

ESCROW FANNIE M

037

0.00

0.00

0.00

SAVINGS PLUS

055

0.00

5,910.37

5,910.37

WEALTH BUILDER

067

0.00

0.00

9,131.47

8,939.88

CHECKING

110

0.00

0.00

10,228.01

228.01

CERTIFICATE

300

0.00

8,766.06

542.71

USED VEHICLES

610

0.00

300.00

15.00

OVERDRAFT PROT

693

0.00

0.00

101,755.86

761.51

FANNIE MORTGAGE

790

0.00

Recent Conversations With Member

Contact - Date: 03/28/2018 Time: 17:41:31

Name: DAWN

By Emp: <G

Memo Type: GQ General Inquiry

transaction inq. -Nate

Contact - Date: 03/05/2014 Time: 10:28:49

Name: DAWN

By Emp: \$M

Memo Type: TQ Phone Transfer

Transferred \$200.00 from 000 acct to 811 acct. No fee. carol

Show Me The Steps

Tell Me How

Total funds in0.00

Check cash fee -0.00

Transaction net -0.00

Cash back0.00

Post Funds In

Corporate Checks

Refresh Cashback

Balance Forward To New Member

Deposit Calculator

Balance Forward To This Member

FR (3104)XL 10/31/16

XL

Remember these are blue-sky dreaming mockups only!

WHAT WE'VE BEEN UP TO SINCE NOVEMBER

WHAT WE'RE COMMITTED TO FOR EXPRESS TELLER PHASE 1

- New search engine
- Engine for the search page messages/graphics
- New driver's license display
- New GOLD look-and-feel for Teller Express screens
- Standard/Large/X-Large screen sizes for Teller Express screens
- New workflow controls, ability to limit which features are available
- Simpler auto-security for tellers

■ Other work we've been doing:

- Initial technical brainstorming meetings on the search engine, image display and underlying architecture
- Spec work on the new workflow controls configuration

Remember that these changes will apply to Express Teller only...we're reengineering the infrastructure, getting ready for years of coding projects to come

2019 BOUNTY PROJECT

EARN UP TO \$30,000!

It might look like one of our usual occasional contests, but it's based on a belief in including everyone in the economic benefits of doing the work

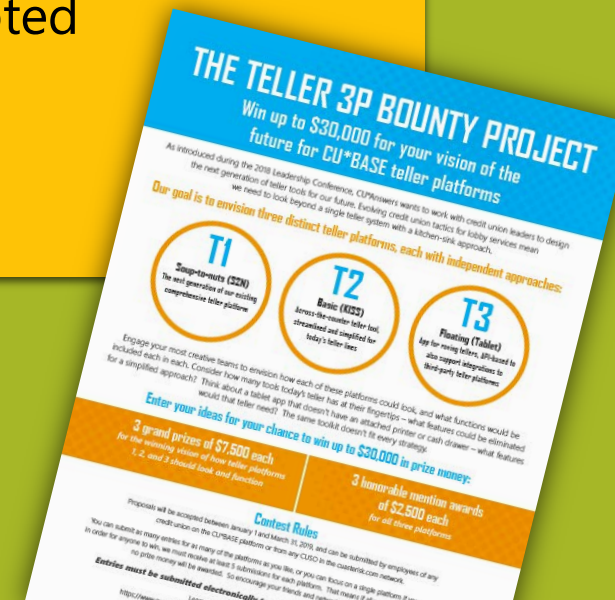
Engage your most creative teams to earn up to \$30,000!

- \$7,500 each for the winning vision of how platforms 1, 2, and 3 should look and function
- \$2,500 for one honorable mention for each platform

But for anyone to win, we must receive at least 5 submissions for each platform

Proposals will be accepted
**January 1 to
March 31, 2019**

open.cuanswers.com/Teller3P



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CU*ANSWERS Products Solutions Resources Events Shop About

In the Kitchen: Designing Teller Platforms for Our Future (Teller 3P)

What's cooking in the kitchen?

We're always cooking up new ideas here in the CU*Answers Kitchen and we'd like to share some of our current recipes with you. These are some of the large topic projects that are currently in varying phases of development.

What's cooking?

Resources In the Kitchen

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, 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](#)

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](#)

In This Section

- In the Kitchen
- Mobile Development Priorities for 2019
- Freddie Mac: Changes to Investor Relations
- RDC Projects in the Works
- CU Self-Directed Data Floods
- Online Forms: Introducing the "It's My Turn" Form
- EFT Card Control Projects in the Works
- Bill Pay Projects in the Pipeline
- Online Security Projects in the Pipeline
- CECL and CU*BASE
- Viewing Check Images via CU*BASE

WHAT'S NEXT?

JOIN THE TELLER 3P TASK FORCE!

May 29-30, 2019

Wednesday

3-5pm Defining the Task Force
5-6pm Networking cocktail hour

Thursday

9-4pm Envisioning and Building Teller Platforms for our Future



Register now:

open.cuanswers.com/Teller3P