



**YOUR  
IDEAS**

**THIS  
SHOULD  
BE YOU**

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US**

# 2020 **CEO Strategies** *an interactive event*

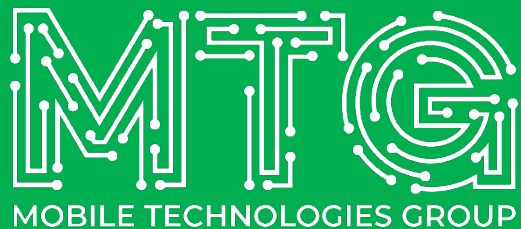
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**Webinar #3**  
**Tuesday, 11/10/2020**  
**2:00pm-3:30pm**

**STUDIO B GUEST: Kristian Daniel**

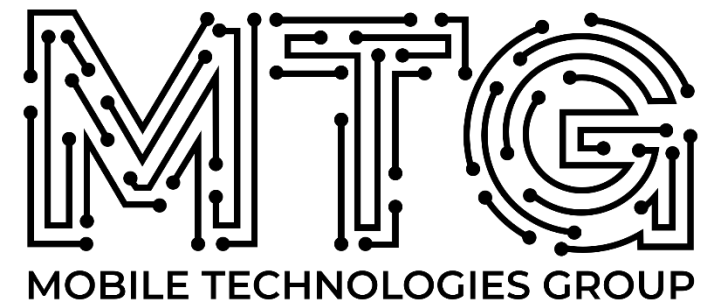


WHAT CEOS NEED TO KNOW ABOUT

# Do-It-Yourself Mobile Capabilities

# What CEOs need to know about do-it-yourself mobile capabilities

- Last year we committed and marketed that the CU\*Answers network was going in the **mobile app business**
- Planning to transform our programming, client support, help desk, and consulting efforts into a full-on mobile specialty firm





# What CEOs need to know about do-it-yourself mobile capabilities

The characteristics that fuel this vision:

- Mobile apps are a **one-on-one instance** with the organization offering the app to their community (membership and open market)
- Based on the one-on-one approach version controls, the number of apps per client, deployment to stores, and life cycles of apps, **development is far different from the software as a service concept**
- While there are many customization and configuration options in a core solution like CU\*BASE, mobile and even OLB has a much higher opportunity for the CU or MTG client to **be the author of mobile apps**



# What CEOs need to know about do-it-yourself mobile capabilities

We threw down the gauntlet:

- Development of modules tools for features
- Master navigation tools for independent look-and-feel navigation
- Project to include both in our CU Publisher self-service platform
- An aggressive development calendar to present a new future with Mobile 5.0 and the new “mobile first” online banking foundation coming out in 2021

**Updates on all of this in  
the next webinar:  
Thursday morning at 9am**

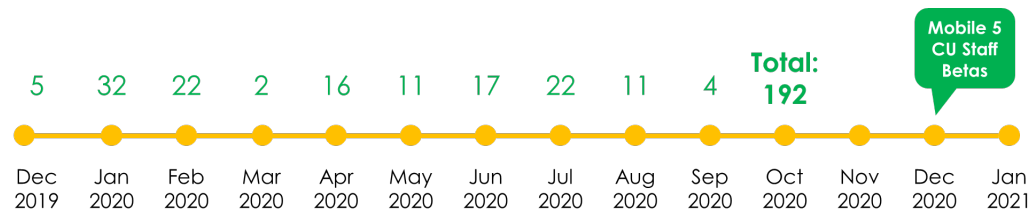
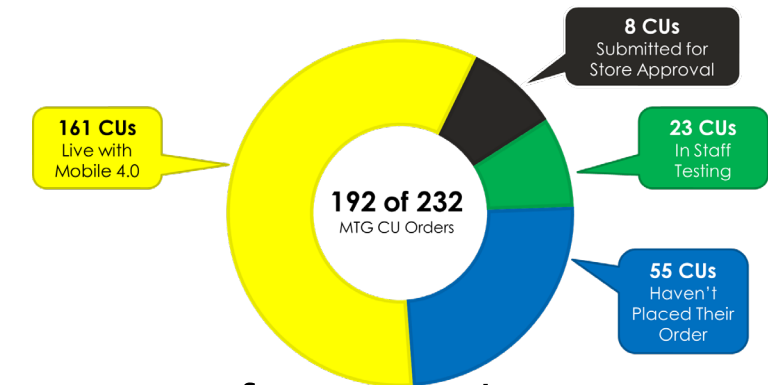
**So...what did we learn?**



# So what did we learn?

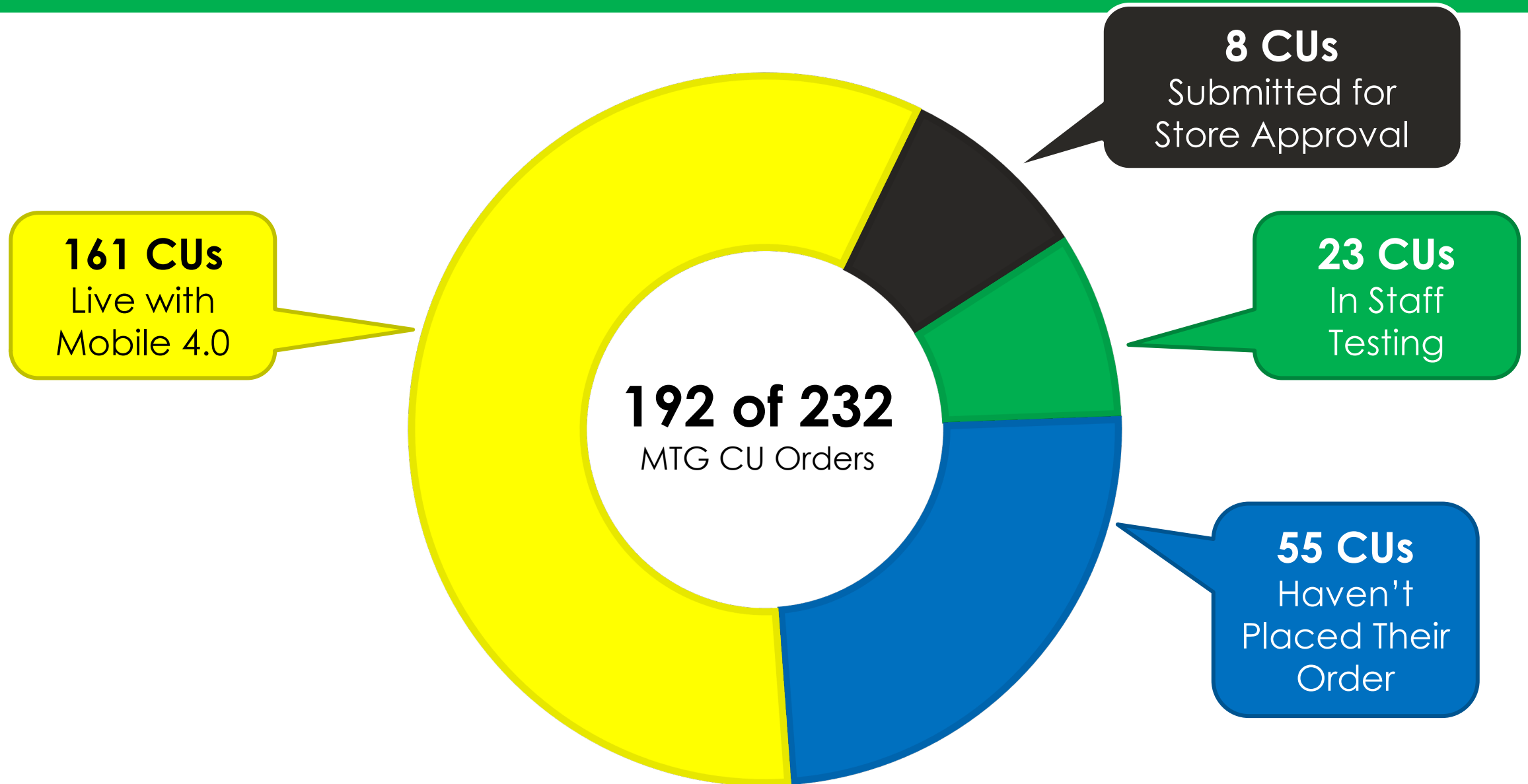
## 2020 TIMELINE: THE TRANSITION FROM MOBILE 3.0 TO MOBILE 4.0 AND NOW TO MOBILE 5.0

- See the credit unions selecting their own cycles
  - One-year life, two-year life, etc.
  - Think about the life of Apple iPhone from version to version
- I doubt deployment fees are the issue – more the pace of projects and the feedback from member adjustments
- What will a mid-year PTF mean to the shelf-life of versioning? Who will you be, and what will drive it?



**Kristian**, can we show these graphs to everyone?

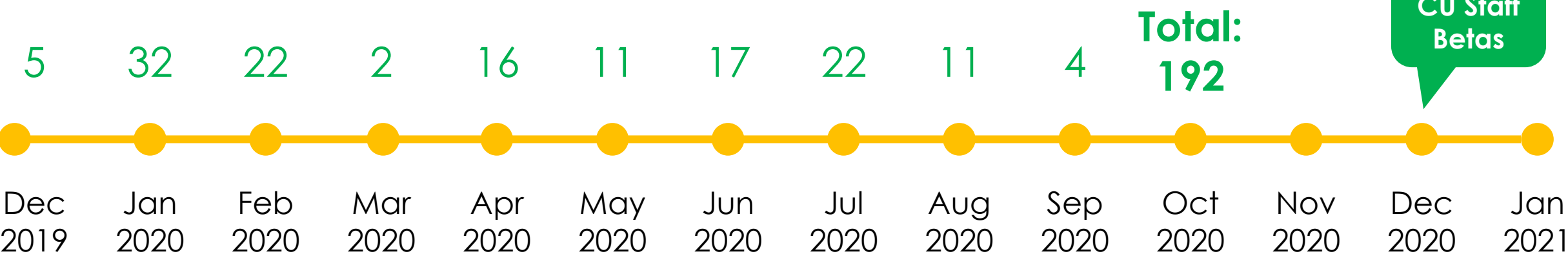
# The move to Mobile 4.0





# The move to Mobile 4.0

# of 4.0 deployments so far:





# What is the future of self service and the vision for CU Publisher modules?

- Every CU staff has one person who says, “we should take control and manage these options!”
- Should you? Only a CEO would know
- Money is not the main issue – *look at the tradeoffs*
- Speed to change is a preference – *how active do you want to be?*
- Commitment to the investment is my key – *but your advantage is you can change from year to year*

**Now let's hear from Kristian...**

⚙️ CUPublisher

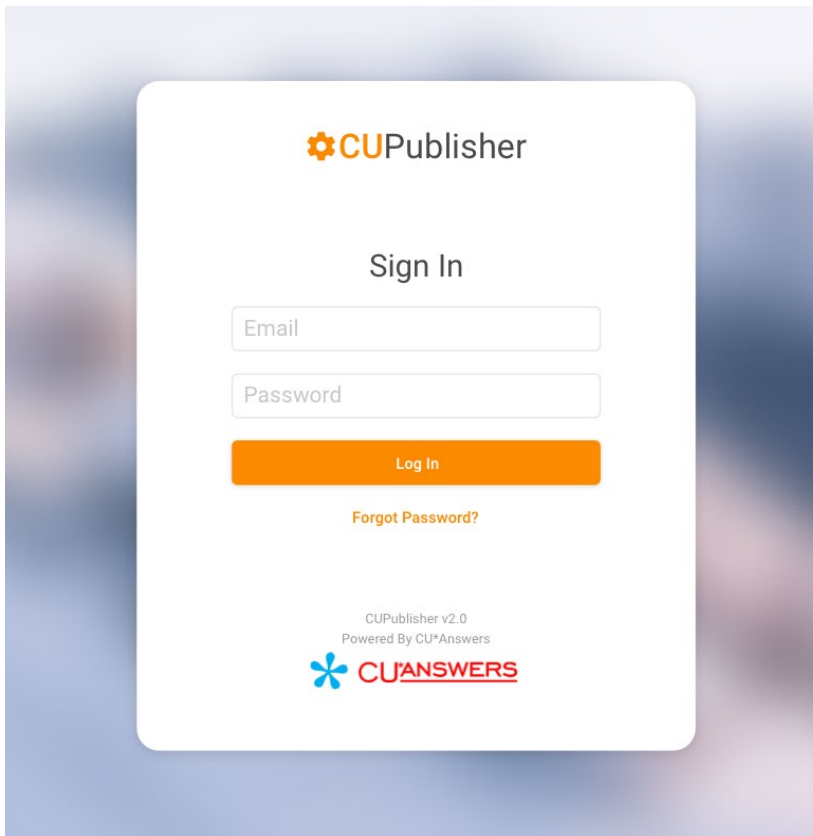
📄 CU Info

📱 Mobile Manager

🔔 Mobile Alerts

📋 Form Generator

📁 Request Center







## Your CU Information

### General Information

Regulatory



Branches



Testimonials



### Mobile App

Assist



Social Media



Mobile Experience



### Manage Team (Admin Only)

Select a team member to edit data and manage privileges.



Kent



Karie



Sarah



Jim



Nathan



Kelly



Jesse



Karamo

[Create New Alert](#)

## Active Alerts

Title	Platform	Timing	Start	End	Apps	Triggered On
✓ Maintenance Alert		Scheduled, One-Time	Mondays at 8:00am	Mondays at 4:30pm	All	Card Controls, Every Time
✓ Branches Open at 10am ...		Scheduled, Recurring	2/12/2019 at 8:00am	2/15/2019 at 4:30pm	All	App Launch, Every Time
✓ RDC Temp		Recurring	—	—	All	RDC Launch, Every Time

Branches Open at 10am This Week  
Due to severe weather in the area, our branches will be opening at 10am this week for your and our employee's safety. We apologize for this inconvenience.

## Scheduled Alerts

Title	Platform	Timing	Start	End	Apps	Triggered On
✓ New Spring Hours		Scheduled, One-Time	4/1/2019 at 8:00am	8/1/2019 at 8:00am	All	App Launch, One-Time

## Inactive Alerts

Title	Platform	Timing	Start	End	Apps	Triggered On
✓ Write Name on RDC Che...		1/2/2019 at 7:00am	Tuesdays at 8:00am	1/22/2018 at 7:00am	All	RDC Launch, Every Time
✓ Branches Closed Due to ...		Scheduled, Recurring	2/12/2019 at 8:00am	2/15/2019 at 4:30pm	All	App Launch, Every Time
✗ All Branches Closed		Scheduled, One-Time	2/22/19 at 9:00am	2/22/19 at 4:30pm	All	App Launch, Every Time



Cancel

Save

2018 Board Elections

Kenny saved this form  
on 7/11/2018 10:37pm EST



Preview

Form Options

FORM

CONFIRMATION PAGE



细 喽



Please fill out this form to receive your free Success Credit Union  
2018 Board Elections Voting Packet By Email



Enter Field Title...

32

Maximum  
Characters

Required



Continue

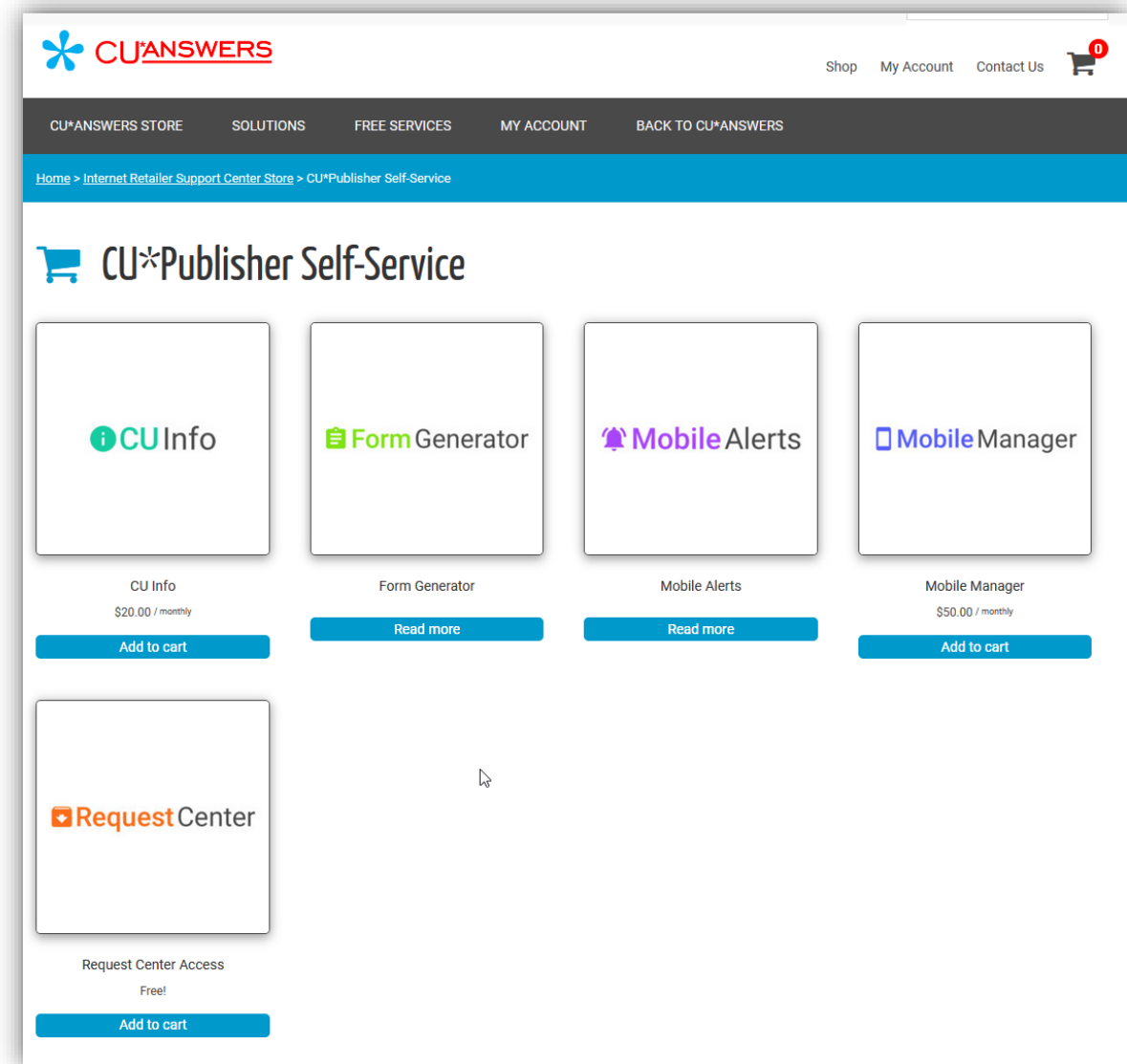
Please fill out this form to receive your free Success Credit Union  
2018 Board Elections Voting Packet By Email

Enter Phone...

Enter Email...



# LEARN MORE IN THE STORE



- In the next year MTG will get aggressive about marketing and promoting the value of Self-Service Platform Tactics
  - Commercials – the push to get CUs to complete their due diligence on these strategies
  - Webinars and Focus Groups for active CU players
  - More pricing analysis for future investments by both sides
- Can these services fuel new vendors and offers in the network?
  - CUs, CUSOs, Group Providers – and the race is on

**Can MTG become a vendor for a growing list of vendors and vendor types?**

# Conclusion



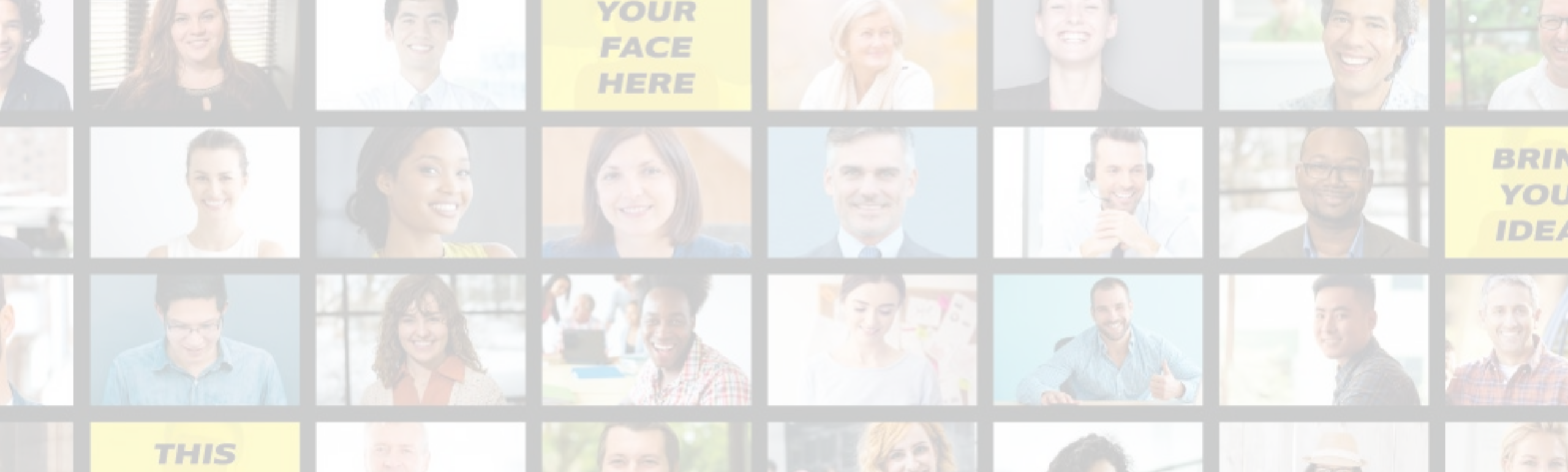


## Conclusion

Can you see it, do you believe it?

MTG puts our network square in the middle of the mobile app business

Everyone in our CUSO community will earn with and because of this for years to come



**Thank you!**