



What You Need to Know About the NEW **It's Me 247** Online Banking Arriving Summer 2021!

When Will I Receive the New Online Banking?

- The new online banking will roll out this summer. We will be deploying to credit unions in different groups. Each group will begin with a staff-only 'test drive' period before the new online banking is made live to members. Group 1 will begin their test drive at the end of June, with additional groups starting their test drive periods in the weeks that follow. **The full deployment schedule can be viewed on the CU*Answers Kitchen.**

What Should I Communicate to My Members?

- Explain that a new look is coming this summer, and when ("This summer online banking is getting a whole new face – same great features, some really cool new ones, and a brand-new navigation look-and-feel!")
- Explain how the login buttons on your website will be changing, and when
- Highlight some cool features you want members to notice
- Explain where you want them to go to learn more, see a preview, read FAQs, or ask a question
- Explain that the ItsMe247.com URL is not changing but if they've bookmarked the OBC page they should delete that bookmark and come to your website instead
- Above all, don't go overboard and freak everybody out. Just let them know "something cool is coming" and "we think you'll love it" but remember that websites change every day and members will quickly adapt, just like they do every day on their other favorite shopping sites.

How Will the Staff Test Period Go?

- Each group of credit unions will begin with a staff-only test drive, which will last for approximately 2 to 4 weeks before the new online banking goes live for members.
- Your team will receive an email with a temporary URL that will be used in order to access accounts from the new **It's Me 247** software.
- This test drive is a REAL website that accesses your LIVE member data – so your teams will be able to log in to your own personal accounts, make transfers, etc., using your actual accounts. Yes, it posts to CU*BASE just like the existing site does! Explain that during the test drive period you'll be given a special temporary URL you'll need to use in order to access your accounts via the new site. (That URL will work only during the test period, then will expire.) The existing URL will continue to work like it does now until the day when we shift your members over to the new site.

Website Changes: What Do I Need to Do?

- Soon you'll be receiving a document explaining what will be changing if you use a direct login widget on your website. You'll need to review how the widget you currently use will be changing on your live date. If the new look is one you like, you don't have to do anything. But if you prefer a different look, think about switching to another widget now, or make a plan to adjust your site on the day you go live.

What Should I be Doing Now?

- Post an alert on your website that changes are coming this summer.
- Figure out a plan for if and when you need to make adjustments to the login widget on your website.
- So that members don't think they're being spoofed, decide how you will communicate to members that the login method on your website will be changing and when.
- Consider doing a Member Connect campaign to let your existing online banking members know about the upcoming change.
- Rally your staff to be ready to give your site a good shakedown during your assigned test drive period.
- Review your existing online banking site to remind yourself of any customizations you've done, special custom links you might have, etc., so that you can compare when the test drive begins to make sure everything's still in place.
- Come up with a few tips for the things your members might ask about and have a place to post FAQs as you get them so members and staff can quickly help themselves and each other.
- If you have a focus group of members that like to be in on the ground floor of any changes, consider recruiting them to participate during the staff test drive period if you like.
- Rally your call center and MSR teams, pump up the excitement, encourage an attitude of "we've got this!" so everyone is ready (but not worried!)