

CU\*ANSWERS



CU\*BASE<sup>®</sup>

Strategic Release Management

## Why should I use CU\*BASE Strategic Release Management?

Are you a motivated leader who wants to ensure you get the most out of the cooperative dollars put into the development of each release? Strategic CU\*BASE Strategic Release Management is a premium service designed for you, to ensure your strategy makes the most of your investment. Work with us on a limited engagement, or longer term if you wish, to develop the know-how to put the CU\*BASE releases to work for you.

“CU\*BASE Strategic Release Management is for the executive with the vision to see that implementing new technology should be at the forefront of each credit union’s strategic business plan. Each release represents your financial investment into the collaborative. Are you making the most of these often free and low-cost solutions? If you don’t already have a strategy, let’s work on one together. If you already have a process, work with us to fine tune your strategy.”

Randy Karnes, CEO, CU\*Answers

“It was awesome! I had a team of CU\*Answers experts at my fingertips. Each presented their synopsis of the release items. I was able to ask questions and gain more insight into each specific enhancement. The team was wonderful.

I will take advantage of “just turning it on” while I’m on the call and utilizing your teams to help us get stuff moving instead of putting it on the shelf to do later.”

Love it!”

Linda Bodie, Chief + Innovator, Element Federal Credit Union

 CU\*ANSWERS  
Management Services



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## What can I do to make the most of this investment?

Come prepared to get the most out of your sessions. Attending release training or reading the release summary is considered vital for successful CU\*BASE Strategic Release Management engagements.

## Will the sessions be scheduled before the release is implemented or after?

Because we want you to have some familiarity with the new features before the training and to be able to activate them immediately, CU\*BASE Strategic Release Management sessions are offered after the release. Participants in the service will be invited to select from several scheduled times for training on a first come, first served basis.

## How much does this cost?

\$2,000 per year, includes two 90-minute training sessions. *(scholarships are available)*

Each is tied to a major CU\*BASE release and is customized by our presenters to meet the needs of your individual credit union, vendors, and membership demographics.



## What consulting do I get for my investment?

Consultants from CU\*Answers Management Services provide personalized consultation via Zoom web conferencing in a rotating format. The presentations explain new features, products and services of the release in an arrangement designed to meet the individual needs of each credit union. After the consultations, the trainers provide a report to the CEO summarizing recommendations for strategic goals for the credit union.

The CU\*BASE Strategic Release Management team also steps in to provide support to make new strategic goals a reality, either with education or assistance in activation. Additional fees may be required and will be discussed during and after the training.

## Can I just ask for help with a single release?

CU\*BASE Strategic Release Management is not available for a single release and is only available via an annual engagement, which includes consultation for two CU\*BASE releases.

## How many people can sit in on the consultation?

We highly recommend that this include the CEO and members of your senior executive team attend. You may also want to include a member of your operations staff who will be involved on the implementation. The number of attendees is not limited to these two people, however. You may include as many people as you like on your end.

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## Getting Started

Contact CU\*Answers Management Services by email to [cmssales@cuanswers.com](mailto:cmssales@cuanswers.com) or by phone to Julie Gessner, 800-327-3478 x131