

DESIGNING TELLER PLATFORMS FOR OUR FUTURE (TELLER 3P)

Project Recap

A CEO Strategic Boot Camp Initiative

LOCATION:
CU*ANSWERS
6000 28TH STREET
GRAND RAPIDS, MI 49546

Revised 1/15/2019



Project Kickoff

A CEO Strategic Boot Camp Initiative

November 2018: During the 2018 CEO Strategic Developers Boot Camp, 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.

Task List

Between now and the task force event in May:

- Communicate results of CEO Boot Camp
- Coordinate a virtual community for research
- Series of webinars designed for TNT (Teach Negotiate Tell) for any interested CU participants
- We will explain the projects ahead
- We will provide data that will help with the design specifications for where we're going

After the task force event:

- Make go/no-go decisions: move forward dramatically or stay the path of evolution
- Complete design specifications for what's next
- Engage developers and implementers for pilot projects

If you're looking for a concrete projects with completion dates, we might not be ready with that until 2020. In the meantime we're moving forward with the confidence that we'll make timely, contingent decisions when needed.

Bounty Project

Win up to \$30,000 for your vision of the future for CU*BASE teller platforms. Proposals will be accepted starting January 1, 2019, through March 31, 2019.

Participate in Conversations with Subject-matter Experts

Teller 3P Project Webinars have been scheduled for Thursday February 14, to update interested credit union teams on what we've been doing since the project was introduced to CEOs at the November CEO Strategic Developers Boot Camp event, and what our future plans are for the project. Please join us!

Register for the T3 (Floating/API Integrations) Status Update
February 14, 2019 | 1:30 - 2:15 PM ET

Register for the T2 (KISS) Status Update
February 14, 2019 | 2:30 - 3:30 PM ET

Webinar registration available at
open.cuanswers.com/webinar-t3-api
open.cuanswers.com/webinar-t2-kiss

Additional Resources

Fill out a worksheet with your ideas about teller functions

Project Overview and early mockups

Teller 3P Bounty Project flyer

Introduction from 2018 Leadership Conference

All documents available at
open.cuanswers.com/Teller3P

Task Force Event May 29 & 30

Join the Boot Camp Task Force

Join this Boot Camp Task Force and help us envision three distinct teller approaches: the traditional soup-to-nuts platform used today, a modern keep-it-simple design, and an app that would let tellers roam the lobby with a tablet.

Agenda:

This Boot Camp Task Force will merge the tactical players at credit unions into a unit to solve today's questions surrounding branch management, tellers, budgets, and more. In addition to recruiting your subject-matter experts, we're looking for credit unions who are willing to engage the Teller Design, Earnings Edge, and Imaging Solutions teams and have a strong desire to move the ball forward!

- A deeper dive on the topics and ideas from the CEO Boot Camp event
- For project managers and people who are capable of rallying their CU to activate new solutions
- Hoping to get 25 CU teams to join the task force

Day 1 (Wednesday)

3-5pm Defining the Task Force

5-6pm Networking cocktail hour

Day 2 (Thursday)

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

To register, visit the Kitchen page:
open.cuanswers.com/Teller3P

