



CHAMPIONING A **CUSTOM SERVICES** *Project*

IT'S TIME TO GET STARTED

You've found a vendor and want them connected in some way to CBX or It'sMe247. We've asked if you're committed to being the "**Champion**" for the project. What does that mean?

Being a Champion involves three key responsibilities:

1. Managing and owning the relationship between vendors
2. Providing input and making decisions on design
3. Implementing and testing the solution

There's often a fourth component—**funding the project**—though not always. Sometimes vendors fund the project instead. However, your role as the champion doesn't change, even if the vendor provides the funding.

Let's look at each responsibility in more detail.



A CHAMPION'S RESPONSIBILITIES

1. MANAGING AND OWNING THE RELATIONSHIP BETWEEN VENDORS

As the credit union that introduced a vendor, you hold the relationship with both the vendor and CU*Answers. CU*Answers will likely not have a direct relationship with the vendor, so it's your responsibility to manage that connection. You're in the driver's seat, ensuring both parties stay engaged and on track. This means you will be required to attend meetings and follow along. This is certainly not a spectator role.

The vendors should not be directing each other.

In the unique case where CU*Answers introduces the vendor and is simply seeking a credit union to commit to being a champion, you would not be responsible for managing the relationship.

2. PROVIDING INPUT AND MAKING DECISIONS ON DESIGN

As we collaborate with vendors to develop an integration or solution, we'll often encounter decision points where there's more than one way to proceed—or where trade-offs are needed. At these moments, we rely on your input to determine which approach best fits your credit union's needs and workflows.

We may also ask for your input on priorities, feature sets, workflows, rollout strategies, and other aspects that only end users can accurately assess.

3. IMPLEMENTING AND TESTING THE SOLUTION

Once development is complete, we'll need a champion credit union to test and provide feedback on the solution. Before finalizing the project, we want to ensure everything functions as expected.

Often, challenges arise due to differences between the credit union's live environment and the development environment. This is why having an engaged champion credit union is so essential to project success. Once the champion credit union approves we'll make it live for use in production!

QUESTIONS?

If you have further questions about being a project champion, please reach out to our [Custom Services Team!](#)