

CU*ANSWERS



FISCAL 2019 (4TH QUARTER STATISTICS)

CUSTOM PROJECT
REQUESTS SUBMITTED:

147

NUMBER OF CU*BASE CLIENTS
SUBMITTING PROJECT REQUESTS:

72

CUSTOM PROJECTS
COMPLETED:

94

PROGRAMING HOURS:

3,075

INVOICED CUSTOM
PROJECT REVENUE:

\$259K

CU*A DIRECT PARTICIPATION \$
(TOWARD CUSTOM PROJECT DEVELOPMENT)

\$4K

AVERAGE R&D PROJECT FEE:

(R&D \$ ARE APPLIED DIRECTLY
TOWARD COMPLETED PROJECTS)

\$1.4K

AVERAGE CUSTOM
PROJECT FEE:

\$3.1K

DHD REFLECTIONS | DEC., 2019

MEET LORIE MORSE & KIM CLAFLIN!

Lorie Morse - AVP Integrated Technologies:

Being a part of the DHD team since the beginning has been very exciting! I have been with CU*Answers for 26 years starting as receptionist, moving throughout the company, and now serving as the AVP of the Integrated Technology team. Without a doubt, helping create and build our DHD business initiative has been one of the most fulfilling (and eye opening!) experiences of my career.

In my AVP role, I see a wide variety of custom project requests, including the many third-party vendor integrations being explored by clients. An important part of my job is to carefully review each of these custom requests and provide our Project Team with an initial overview of each at our weekly meetings. I gain their input and get the project bid process started. In the case of more complex project requests requiring additional research on project specifications, work requirements, and impact on our CU*BASE network, a research fee is often applied. Once this research process is completed, I develop a final project bid for client review and approval.

Our team strives to ensure our client's experience is positive and meets their project expectations. If you're curious about what the DHD team has to offer, I'd love to talk with you. Just let me know!



Kim Claflin - Manager of Custom Services Development:

I have been with CU*Answers for just over 8 years, working on custom projects during that time. Helping credit unions customize how they use CU*BASE is just one of the ways the DHD team supports our network of clients. Being involved in these projects with the DHD team has been very rewarding for me.

My DHD-related duties include: gathering requirements from both credit unions and vendors to determine the scope of projects; communication with our credit unions regarding project statuses; and overseeing validation of data provided to both credit unions and third-party vendors. I am involved in many projects from conception to implementation and it is exciting to watch how everything comes together.



I like the "out-of-the-box" solutions that the DHD team works to develop for and with our credit unions. If you have an idea that you would like to discuss, please reach out to the DHD team and we will be happy to talk about it with you.

CLIENT PERSPECTIVE

Sageworks (Abrigo) provides financial analysis and risk management software to financial institutions. CU*Answers has developed a daily data file extract to be delivered to Sageworks which may include various loan, collections and deposit data.



"We are excited to have a solution in Sageworks (now known as Abrigo) that allows us to get an answer back to our business members faster. The Electronic Tax Return Reader, along with the rest of Sageworks' lending solution, offers full automation of the member's lifecycle from beginning to end. Its integration to CU*BASE has significantly improved our efficiency to input and process these loans. The DHD team worked with me step-by-step to get everything set up with Sageworks. They did all the heavy lifting of building the data files and worked directly with Sageworks, while keeping me informed of the project status."

~Hollie Britton, Frankenmuth CU