

CU*ANSWERS



CU*BASE Strategic Release Management

CU*BASE Strategic Release Management equips credit union managers and executives with strategic approaches for the implementation and utilization of CU*BASE platform enhancements.

CU*BASE®

Strategic Release Management



CU*ANSWERS
Management Services



Strategic Release Management

Value of Participation

You have spent weeks reviewing CU*BASE Release documentation. Your staff has attended CU*Answers Release Training web conferences.

Now it's time to put all you have learned into action. Knowing exactly which features require action, and how to use others to create alignment with the goals of your credit union can seem overwhelming.

You are not alone. CU*Answers Management Services has an experienced team standing ready to guide you in your learning and decision-making processes.

How CU*BASE Strategic Release Management Benefits You

- Integrates strategy, objectives, goals and technology making enhancements tangible.
- Well-defined approach helps you to maintain control over your tools while creating value for users and members.
- Dedicated connections to the people inside of CU*Answers that will help translate tools into specific strategies.
- Allows you to establish alignment between your CUSO partner and credit union.
- Equips you with actionable outcomes beyond a focus on technology, products and features.

Together we will ensure your credit union staff are empowered to use CU*BASE tools to create value for your members.



What You Will Do

Knowledge is power. The more your team knows about the specific language and aspects associated with features included in the CU*BASE Release, the more successful you will be.

Requirements of participation are simple and easy to manage:

- Review CU*BASE Strategic Release materials
- Actively participate in Owner's Voice
- Assign at least one representative from your credit union to organize meetings and measure progress against your credit union's overall objectives



Our Associates | CU*BASE Strategic Release Management Team

The CU*BASE Strategic Release Management Team consist of one or more associates of each brand associated with CU*Answers Management Services. To qualify, associates will be recommended by their managers and must have attended the Certified Trainer Program sponsored by the CU*Answers Organizational Resource and Development.

Organizational Resource Development
Building Teams

Bi-Annual Engagements

Typically, there are 2 major CU*BASE releases per year. Major releases are defined as releases where new tools, changes to existing tools, new dashboards or features requiring activation or configuration changes occur. Credit unions that participate in the CU*BASE Strategic Release Management Services will receive engagement from specialized team members assigned by CU*Answers Management Services at the specific times when the criteria for a major release has been met.

Each Meeting is Carefully Timed and Planned

Each meeting is scheduled by a representative of the CU*BASE Strategic Release Management team and the credit union. Each meeting is held using Zoom, our POV web conferencing tool. We highly encourage our credit unions to utilize their web cams to interact with us personally!

Each meeting will typically last 90 minutes. Please be sure to assign the team members at your credit union with the appropriate authority to manage the calendar and process.



CU*Answers Strategic Release Management team members work with you in a rotating fashion. When the first subject engagement is complete, our team taps the next representative on the shoulder. The process is repeated until the service is complete.

Each Engagement is Fully Managed

The CU*BASE Strategic Release Management process is fully overseen by CU*Answers Management Services. Several dates and times are coordinated to assure program flexibility and accessibility. Dates for each series will included on the Course Registration Page on the CU*Answers Website listed as a special category. When dates are published a communication will be delivered to program participants. Times are reserved based on the registration received on a first come, first serve basis.

Post Engagement Recommendations

At the end of your meeting, your CU*BASE Strategic Release Management team member will provide recommendations. The majority of recommendations will be relative to the release. Additionally, recommendations may include special engagements or other educational opportunities defined by your credit union. At the end of the engagement, CU*Answers Management Services will collect results and provide one full report to the CEO.

For Example

CU*BASE Release 19.05 includes features that require action in the areas of Lending, Qualified Dividends and Credit Cards. The following chart outlines the typical services the credit union will receive.



Don't have a web cam?
Visit CU*Answers Network Services on the store to place your order.

Delivery and Fees

All services associated with CU*BASE Strategic Release Management Services will be provided via web conference (POV – Zoom). Requests for travel will be considered on a case by case basis.



\$2,000 Annually



Order from the Store
store.cuanswers.com/solutions

CU*ANSWERS

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Getting Started

Contact CU*Answers Management Services by email to cmssales@cuanswers.com or by phone to Julie Gessner, 800-327-3478 x131



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