



BUILDING SUCCESS WITH
CUSTOM SERVICES AT CU*ANSWERS:

DO IT *YOURSELF*
PROJECTS

LEARN HOW YOU CAN DO IT ALL!

A cornerstone of the CU*Answers commitment to your success is the **Custom Services Team**. Our Custom Service professionals make it possible for you to dream big and create solutions tailored to your specific needs, with very little involvement from CU*Answers. You provide the vendor, we provide the software that allows access to the core as well as the testing environments and your solutions are integrated into **CBX** or **It's Me 247** online and mobile banking. We call these projects **"Do it Yourself."**

Do It Yourself is not just a brand, but a true description of how these projects come to life. CU*Answers provides only the programs that allow for integration (APIs) and a test environment. The rest is up to you and your vendor. **Do It Yourself** allows you to set features that matter most to you, and the pace at which you and your vendor will manage the project.

We recommend some best practices when starting on a **Do It Yourself project**. The first is to make no contractual commitments until you know exactly what is being provided and ensuring there are no special dependencies CU*Answers will not be able to accommodate. For example, because we operate in a shared environment, we cannot approve a project that could cause disruptions to the services we provide to all clients. In addition, you'll want to be certain you understand if you have special compliance and legal responsibilities based on the use the vendor will be making of your data.



Once underway, the best way to ensure success on a **Do It Yourself project** is to follow these **two guidelines**:

- 1. Stay Involved!** CU*Answers will not be involved in most discussions with your vendor. CU*Answers only provides tools for building. You should have a thorough understanding of what your vendor is building and how it will work. For many projects, understanding what the project won't do is just as important as what it will do. This is especially important to keep in mind when the vendor is bearing the costs of the project on your behalf. You'll need to stay on top of what the vendor is doing with your data, and how the project will work in conjunction with your workflows and member experience.
- 2. Be Mindful of the Budget.** While CU*Answers does as much as possible to keep costs small so our credit unions can dream big, development environments come with costs to set up and maintain. While the APIs are free, there are monthly fees for the development environment, so if you are covering those costs you'll want to ensure you know the estimated timeframe for development. No surprises because the project has taken longer than anticipated! In addition to development environment fees, once a project goes to production there is typically a monthly fee for utilizing and supporting the APIs in production so be aware of that.

What CU*Answers will provide on a Do It Yourself Project:

- Creation and hosting of a testing environment with access to agreed upon API endpoints
- Your test data within the environment
- API support during development
- Assistance with process understanding and how our data works limited to email responses typically within 3 days and up to 2 hours of meetings per month subject to scheduling. If additional hours are required we should discuss a bid to support that.
- QC/Validation – Before PROD keys will be provided we reserve the right to require review

What CU*Answers will not provide on a Do It Yourself Project:

- Any additional programming efforts outside of creating the test environment
- Regular attendance in meetings with your vendor
- Continual resetting of test data or creating unique data cases for testing on a recurring basis

Keep all of this in mind and you're on the right track for an exciting project that is likely to be a success!

I understand the roles and responsibilities outlined above as they pertain to DIY projects.

Name/Title

Date