

Ultradata Users Group Luncheon Meeting
Gaylord National Hotel
National Harbor, MD – Potomac Rooms 5 & 6
August 5, 2011

During the recent Harland Financial Solutions Connections 2011 conference, the UltraData Users Group had a luncheon meeting with representatives from Ultradata. Discussions addressed two main topics:

- 1) Reasons for a CU to move from UltraData to Phoenix; and
- 2) Updates on Case Management and Knowledge Management

The following are some meeting notes from this discussion.

- 1) Reasons for a CU to move from UltraData to Phoenix – Tom
 - a. During May 2007, 19 clients were initially approached in Orlando about moving to Phoenix EFE, as Harland is moving this platform to the Credit Union base.
 - i. Reasons are that some credit unions are starting to look more commercial, while others are more traditional.
 - ii. Engineers are building credit union functions on the Phoenix platform.
 - iii. 2009 had Consumers CU as the first CU on Phoenix, with Dupaco and Spokane Teachers as pilots.
 - iv. Dupaco went live in 2010, Spokane went live in 2011.
 - v. Project is now in the early adapters stage, with Langley coming up next in 2013.
 - b. How does a credit union determine if a move should be made?
 - i. What is the CU focus?
 1. Traditional charter, UD Enterprise likely.
 - a. Continue to enhance, develop and maintain this platform.
 2. Desire to be more commercial based, with commercial lending – Phoenix EFE
 3. General profile – Larger institution over \$500 million, in-house implementation.
 - c. Sales team is now taking this product to marketplace.
 - i. Some existing UD credit unions may be called.
 - ii. BUT, continue to actively sell, support and enhance UD platform
 - iii. “No plans to sunset the UD Enterprise” – want to grow the market.
 - d. Question from audience: Can the modules from this platform be made available for the other – such as commercial lending?
 - i. PhoenixEFE - flexibility for some of the needs, but not fully blown.
 - ii. There are some specific niches, but this still needs work.

- iii. Example could be to install PhoenixEFE, then turn off all unwanted systems – in order to keep Commercial.
 - 1. Could hurt with transactions running 2 cores.
 - 2. Enterprise CRM is another possibility, but only isolated Products and Services.
 - e. Question from audience: GAP between PhoenixEFE and UD business lending / loan servicing?
 - i. PhoenixEFE can service three loan types – Commercial, SBA and participation lending.
- 2) Updates on Case Management – Cheryl Bookhammer
- a. Support Structure.
 - i. Team 3 clients are going to be combined into Teams 1, 2 and 4.
 - ii. In addition to supporting their clients, the following will occur
 - 1. Team 1 will specialize in Front Office
 - 2. Team 2 will specialize in Lending
 - 3. Team 4 will specialize in Back Office
 - iii. Goal for the organization is to have consistency in support, a single 800 number to call.
 - b. Happy to announce that for the 3rd consecutive year, they have achieved the SCP award for both Pleasanton and Des Moines.
 - c. Requested that upon resolution of cases, please complete and return the post case survey. Only 10% are returned, and they would like to have 15% as a metric. The surveys that are returned indicate a 96% satisfaction rate.
 - d. Case Management
 - i. Changes were made in June to help streamline the process.
 - ii. The more information that can be told / provided in the case submission, the faster the response can be.
 - iii. Requested that the knowledge articles are checked.
 - 1. Lots of content available.
 - 2. Reduced “bad stuff” by 25%.
 - 3. Goal is to provide the top 3 questions 85% of the time in the results.
 - 4. Please rate the articles – really helpful
 - iv. Describe the problem in a quick summary – think of as a subject line.
 - v. Web submitted cases were down, but please revisit with the changes that have been made.
 - e. Questions:
 - i. Phone vs Web, is one faster?
 - 1. Not by design that web is faster today, but could be true as the credit union enters the information and it is not subject to interpretation with verbal.
 - ii. Speed of website – some days fast, others not so much.
 - 1. An effort is being made to help with the speed.

2. Working with data center group to help them understand the impact on client facing tools. Implemented new strategies to help improve this issue.
- f. Service Level Objectives
 - i. Little lower than desired, talking about strategies to encourage more web based use.
- 3) Updates on Knowledge Management – Cheryl Bookhammer
 - a. Launched discussion board this week at Connections.
 - b. Q & A section, recent articles section, popular articles
 - i. Users can subscribe to these for answers
 - ii. For year to date ending in August – 226 unique articles accessed 38,341 times.
 - iii. 277 UltraData Enterprise articles published this year, will publish more this year if they have more ideas.
 - iv. Periodically review “not” or “slightly” useful articles.
 - c. Spending time tracking root cause analysis to help with future programming
 - d. Have a tutorial for new employees on how to use tools
 - i. Documents and Bulletin section
 - ii. Recorded training session to show Case Management / KM sections.
 - e. Comments from the group.
 - i. When first using, where does the problem start? Not all products are always listed.
 - ii. Do not like that attachments cannot be added upfront.
 - iii. Do not like the “note to FI” message that is just a “we got your case” message when a note is loaded. Could the email have this info instead of forcing us to log in to see that item?
 1. This has been identified as a training issue that will be discussed.
 - iv. Can the user ID be tied to products, so the listing is shorter?
 1. Advised that this should be true today.

Ultradata Users Group Luncheon with UltraData representation meeting is closed.

Respectfully submitted,

Jim Daly
UD Users Group Recording Secretary