



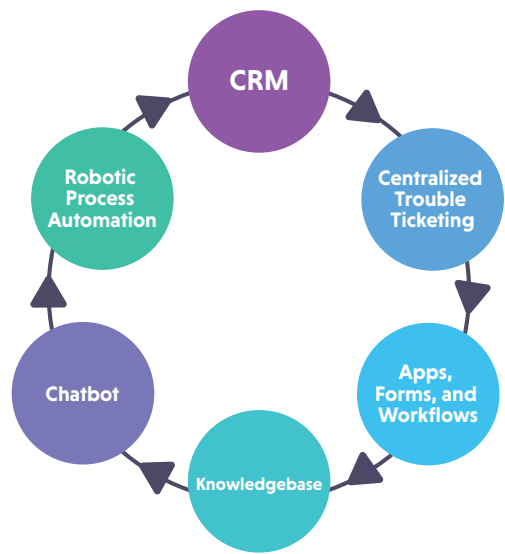
INTRODUCING

Member Relationship Management

CU NextGen's Member Relationship Management, or MRM, platform is your key to next-gen member experience. The robust suite of modules put your credit union in control through a combination of no-code development, robotic process automation, and artificial intelligence.

MRM Modules

The MRM suite is made up of 6 key modules which have been designed specifically for credit unions. The modules are highly customizable, and they all work together to provide the ultimate control in employee and member experience! You can choose to implement any or all of the modules based on your specific priorities and strategic initiatives.

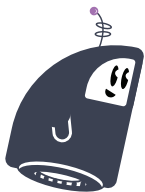


Automating processes not only allows your staff to work more efficiently, it also allows their work to be more meaningful. Plus, utilizing bots for routine tasks means you can truly be available for your members anytime, anywhere!

With MRM's 360-degree view of the member, your agents spend less time searching for information and more time engaging with members.

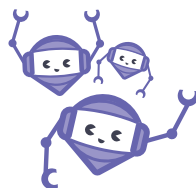
Forms become easy to create, and easy to use, with AppForms. Best of all, these forms can capture eSignatures through DocuSign or Adobe Sign, and your completed forms can even kick off custom workflows—improving the experience for both employees and members.

Technology behind the MRM Platform



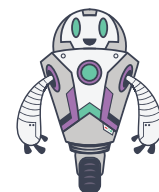
No-Code Development

Create dashboards, forms, and workflows with our No-Code platform, AppForms. These solutions are quick to implement, easy to maintain, and provide the perfect complement to RPA!



Robotic Process Automation

RPA bots enable integration among disparate systems and automation of routine tasks. Bots can work 24x7x365, allowing your staff to spend more time building relationships with your members.



Artificial Intelligence

AI and machine learning solutions can be used for voice assistants, biometric authentication, fraud management, cross-sales predictors, and so much more.

Using MRM for **Contact Center Optimization**

Your Contact Center agents are essential to your credit union's operations. It is critical for agents to have member information at their fingertips so they can better serve members while maintaining an optimal average handling time. The MRM Member 360 view is a breakthrough capability for your Contact Center agents, as they can access member information, initiate requests complete with RPA bots to perform the work, and so much more!



Debit or Credit Card Disputes

Use your credit union's business rules to create an RPA bot that can identify suspicious transactions. An alert can be sent to the member confirming whether the suspicious transaction is fraud. In the event of fraud, an RPA bot can clock the card, generate dispute forms, capture eSignatures, and reissue a new card if desired.



Instant Consumer Loan Offers

Increase your loan totals when you present members with pre-approved loan offers! This use case can be both employee-facing and member-facing.

Employees can be presented with a pre-approval messaging when assisting a member in branch or over the phone. If the member accepts, the employee would gather the remaining details to complete the loan!

Members can also be notified of this pre-approval when using the credit union's self-service channels, such as online or mobile banking or ITMs and ATMs. interested members would be prompted to complete a streamlined loan application.



Referral Workflows

When you automate routine tasks and present member relationship details through a single pane of glass, your employees will have more time to uncover referral opportunities for each member! MRM can provide an intuitive way for your employees to manage referrals for products or services, complete with follow-up notifications—internally and externally, status updates, incentive tracking, and reporting.

Even more use cases!

Account Maintenance	Address Changes & Verifications	ATM Reconciliation
Bill Pay Stop Payments	Creating Recurring Loan Payments in Core Processor	Data Entry from Mortgage POS and LOS
Data Validation Between Multiple Systems	Document Archival and Retrieval	Fee Adjustments and Refunds
Flood Certification & Appraisal Orders	GL Reconciliation	HMDA reporting
Intent to Repossess Letters	Loan Deferments/Skip-a-Payment	Loan Document Preparation
Loan Payoff Letter Requests	Mortgage Insurance Quotes	Negative Share Charge Offs
New Account Creation	Over-the-Phone Loan Payment Processing	Social Security Administration and Asset Verification Solution
Travel Notifications	Unapplied Loan Disbursement	Wire Transfer Processing

RPA and other MRM technology can be applied to tons of use cases. Keys to successful automation projects include repetitive and rule-based processes with high volume and high impact.

The key differentiator with CU NextGen is that our technology platforms are customized for the credit unions. This means our solutions are fueled by robust integration with the well known core systems, as well as the range of vendor systems typically used at credit unions. All our investments into R&D are focused around credit union use cases that optimize the member experience and employee experience.

How does MRM compare to other CRMs in the market?

	CU NextGen MRM*	Salesforce	Zendesk	Core CRM
Enterprise Licensing	✓	✗	✗	✗
RPA, Forms, Knowledgebase built in	✓	✗	✗	✗
Easy to integrate with all Third Party Vendors	✓	✓	✗	✗
Easily customizable to your credit union	✓	✓	✓	✗

*Designed specifically for Credit Union Use Cases

CU NextGen CUSO, LLC is dedicated to bringing next-generation technology to credit unions, helping them improve the service delivered to their members, the daily experiences of their staff, and the efficiency of their operations. CU NextGen's technology is designed specifically for credit unions with significant guidance from credit unions across the nation.

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