



GROWING TOGETHER

VISIFI CUSTOMER
CONFERENCE 2022

Thrive vs. Survive

Aligning Product Strategy to Compete... Together



Meet the Presenter



Rhiannon Stone

SVP of Product Strategy

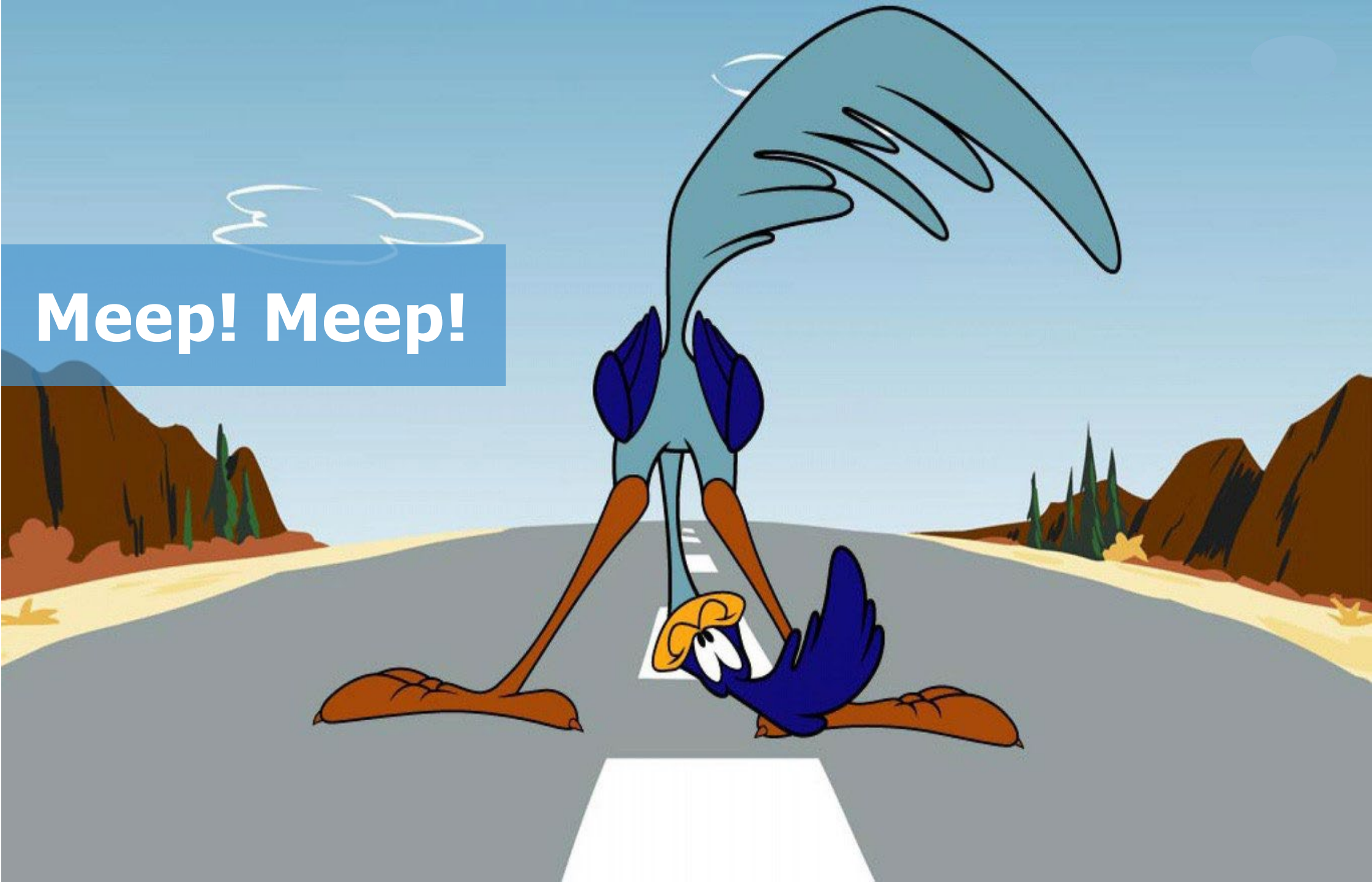
VisiFI

Rhiannon currently leads Product Strategy at VisiFI and has been with the organization 22 years serving in many roles including product management, executive leadership, client support, SDLC, marketing and operational management.



Leaving the
competition behind...

Meep! Meep!





Digital Transformation

Technology is the engine of digital transformation

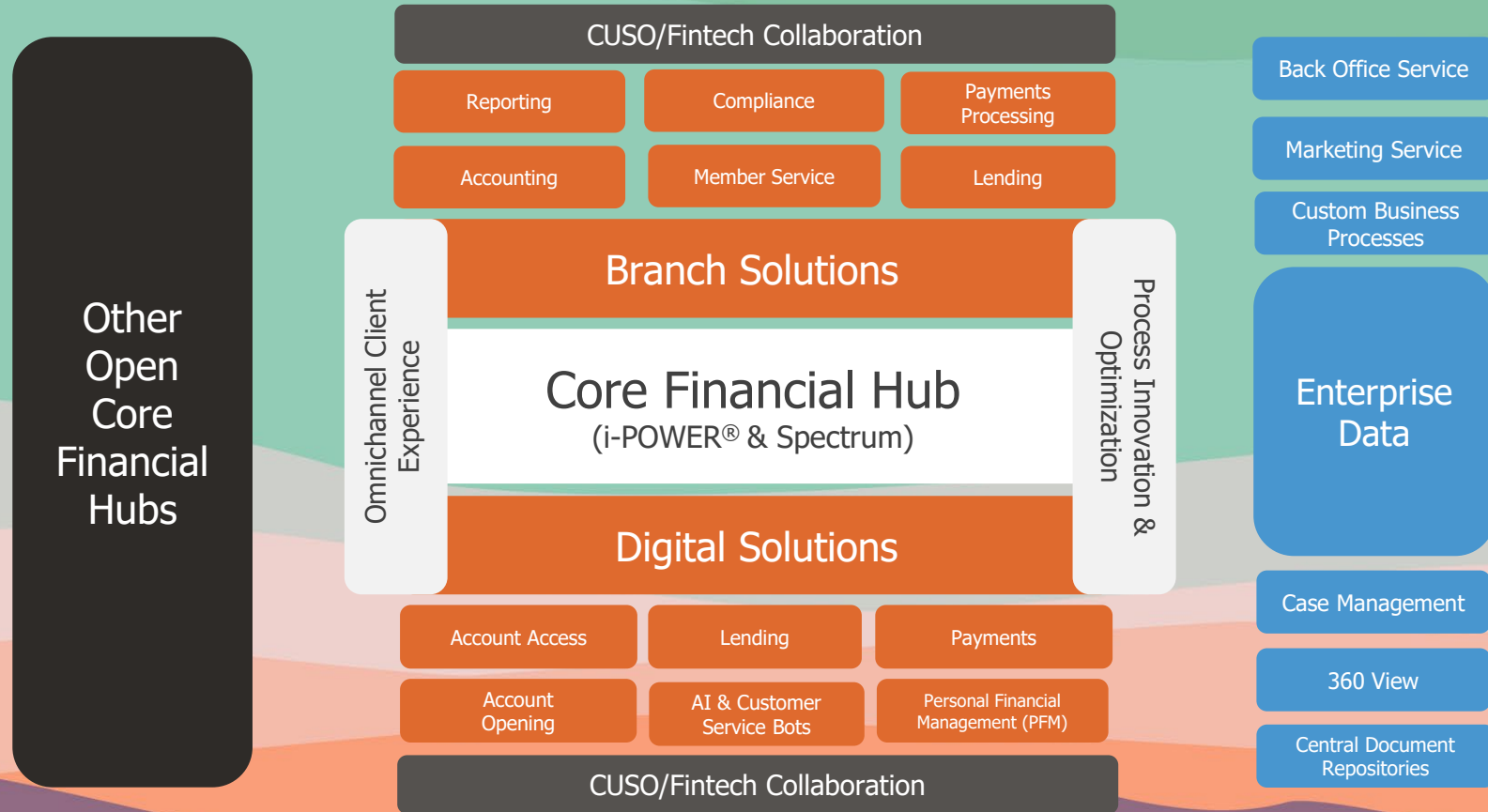
Data is the fuel

Process is the guidance system

Change capacity is the landing gear



Open API Layers

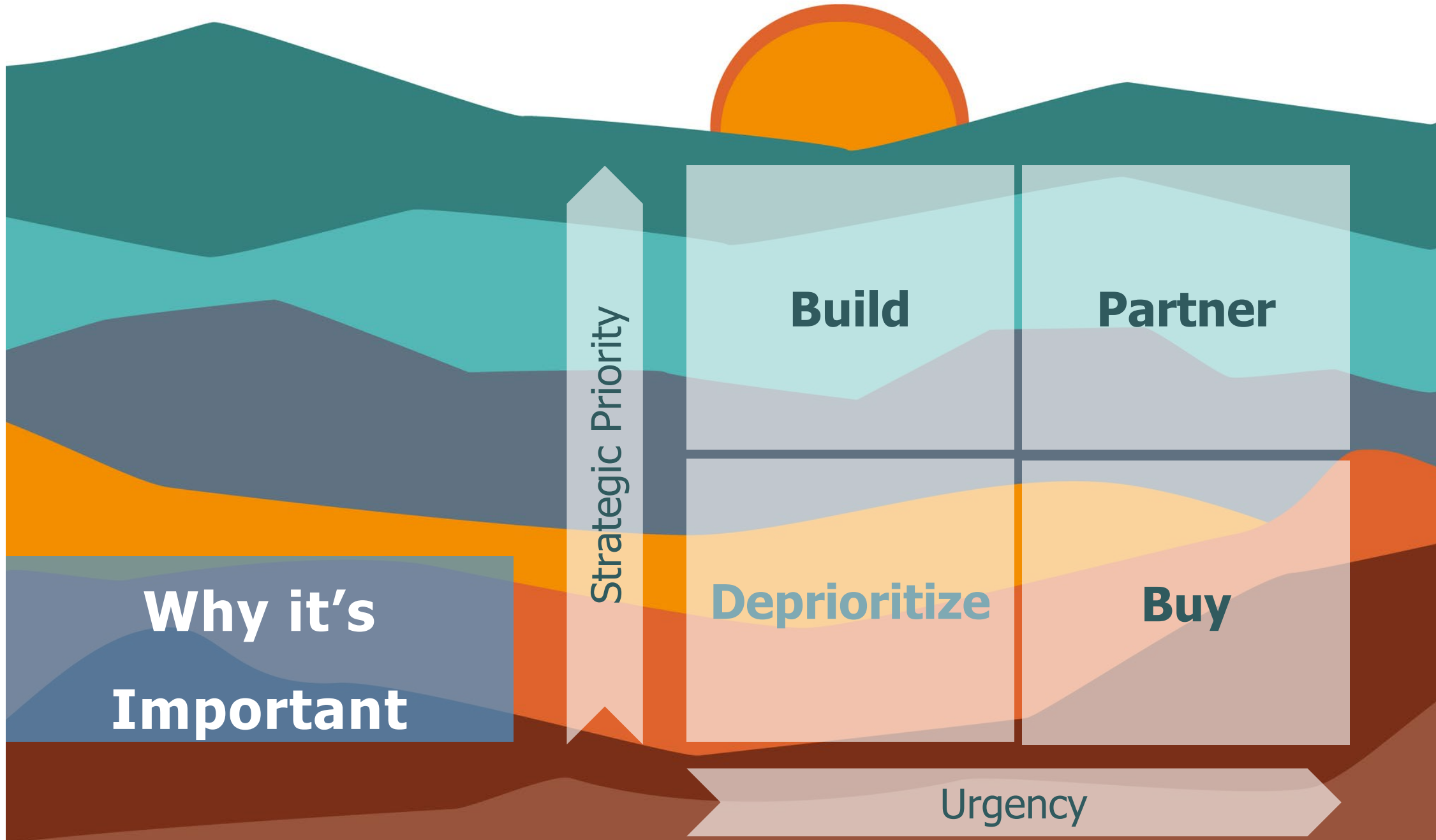


Open API Layers

Branch, Digital, and Open Concept



Packaging Strategy





Digital Solutions Roadmap

54%
Increased
logins

60%
Online
Users

97%
Mobile
Users

Lending

Payments

Account Opening

Personalized Experiences

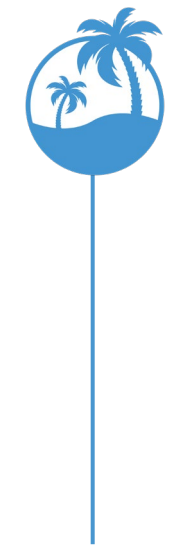
CUSO & Fintech Collaboration



CALLAHAN
ASSOCIATES
the credit union company

Innovation Series
2021 Winner





Core and Ancillary Solutions Roadmap

Lending

Accounting

**Member
Services**

**Analytics &
Marketing**

**CUSO & Fintech
Collaboration**



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2020-2022

NEW PRODUCT PARTNERSHIPS & INTEGRATIONS

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POTENTIAL UPCOMING PARTNERSHIPS / INTEGRATIONS



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Meet the Presenter



Mario Ignazzito

Chief Product Officer

DEDAGROUP NORTH AMERICA Inc.

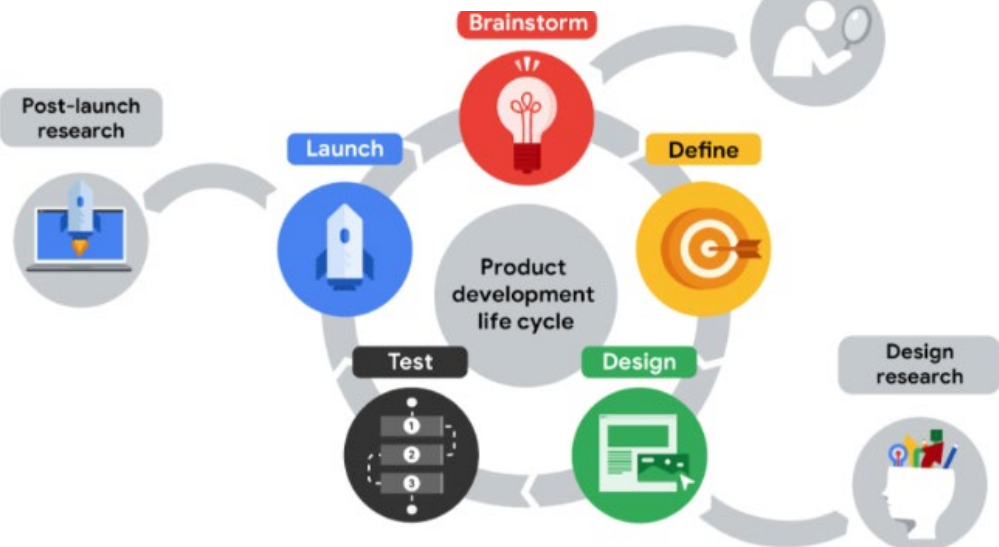
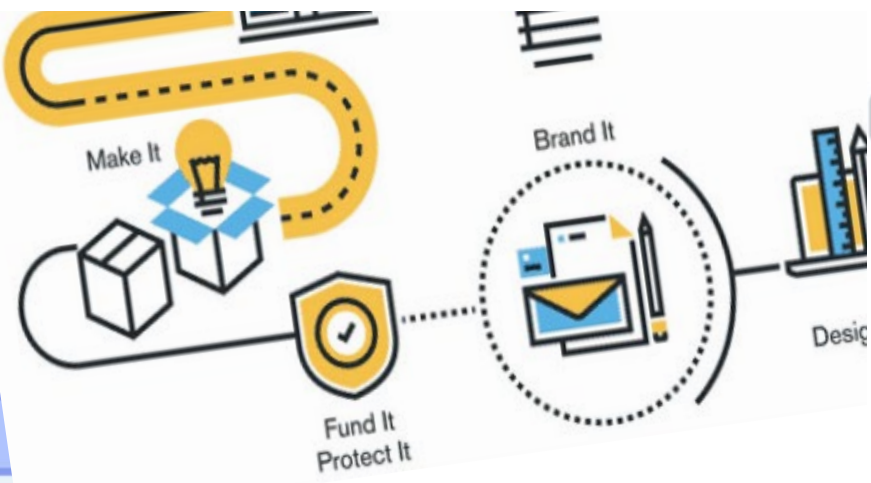
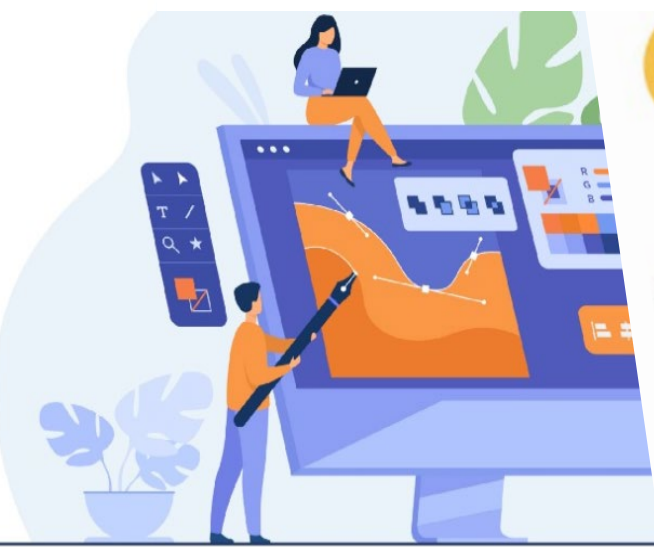
+30 years spent in the cooperative banks' world
across many countries

The Product Development Process



Regardless on what was the process to conceive, imagine and define a new product there is a moment when it's required to have people capable to *get er done!*

At VisiFI, our people are charged to design, implement, install, teach, activate, maintain, support and sustain a healthy, competitive, progressive product. Exactly like a **Factory** does.



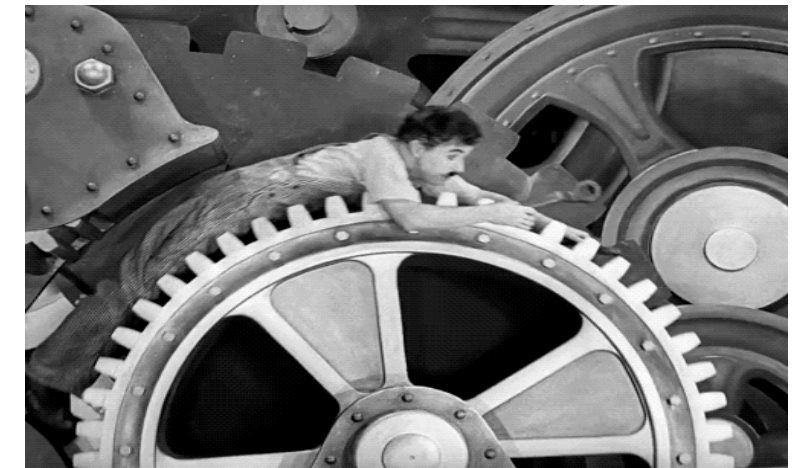
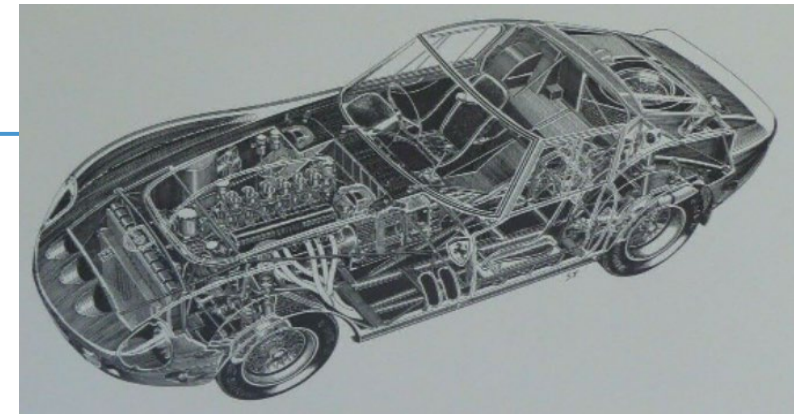


Not exactly this type of Factory ... 😊



Now, in addition to support all the ongoing efforts on *Digital* and *Data* large projects, what is the Factory also working on?

- Preparing *better Blueprints* for new Products and Features with more involvement of End Users and either internal and external SME (i.e., our lending modules and DMS restyling and enhancement, Collections)
- Elaborating an *improved SDLC*: a perfect mix of Technology, Platforms and Methodologies (Agile Hybrid) with stronger control over Processes for a smoother delivery of our Solutions.
- Move toward a refined *Quality Assurance* path with more and better structured sets of Test Cases, specific Non-Regression Test programs and finally Customers involved as Beta and Alpha for larger Projects.
- *Strategic guidance to deliver a pipeline* according to a prioritized *Roadmap*.
- Installing products and features at a never seen pace, 140+ YTD
- Always share with the Customers punctual, precise and comprehensive **Communication** and Knowledge.





A simple example on how the Factory is working according to an Agile Hybrid Cycle ...

| Ticket # | Summary | AH Cycle 1 |
|----------|---|------------|
| 433 | LOS - Implement ability to have multiple subscriber codes for CB Requests (hard hit and soft hit) | AH Cycle 1 |
| 35159 | RTGL Processing - Avoid posting on generic transfer clearing | AH Cycle 1 |
| 34822 | Jaspersoft SSO & 360 VIEW LINK | AH Cycle 1 |
| 12041 | Ability to Email Receipt Member Directly From i-POWER® | AH Cycle 1 |
| 15340 | Need ability to convert business accounts from SSN to EIN | AH Cycle 1 |
| 30819 | PHASE 1: IRS Reporting Enhancement: Add i-POWER Screen for EOY Selections - VisiFI OPS | AH Cycle 1 |
| 34681 | Safe Deposit Box Not Calculating Rent Payments and Refunds Correctly | AH Cycle 1 |
| 35472 | Dormancy letters produced incorrectly | AH Cycle 1 |
| 35385 | Add BSA Rating Field to Client Profile | AH Cycle 1 |
| 35502 | Move i-Power RTGL Permissions to BankUp (phase 2) | AH Cycle 1 |
| 32207 | MPIR: Add Risk Based Pricing Info on Credit Report | AH Cycle 1 |



What the Factory is working on...

- Realizing a broader Openness via new and richer *APIs* available for stronger and new integrations, more data would be possible be exchanged with third parties in an *Open Banking Ecosystem*. Currently we have **more than 80 APIs** available and JD-Power and ChexSystems will be just the next integrations in plan.
- Building a more complete offering reducing more Third-Party dependencies for those who are looking for a **One-Stop-Shop** [in Compliance (BSA), in Lending (Mortgage, Indirect Lending)...]
- Rolling out new Features and brand-new Products (New Roles & Permissions Management for Accounting Suite, CR-5300 Console)
- Reshape functionalities in order to remove some disjointed operations for Tellers for a more streamlined experience with the new Cards module.

