



CMS Updates, Roadmap & Feedback

Tim Bohlman, COO/CTO | Diane Knudson, Director of Web Development

AUGUST 10, 2022



Agenda

- 01 Release Updates
- 02 Release Date
- 03 Roadmap: Next Release
- 04 Future Roadmap
- 05 Client Feedback
- 06 Q&A

Homepage



Release Updates

Updates for Release: Version 6.50

New Modules/Components

- Bootstrap Content Widget*
- Calculators*
- Dynamic Schema
- Internal Search Data Capture
- Personalization (update)
- Webinar Widget

Minor Tweaks

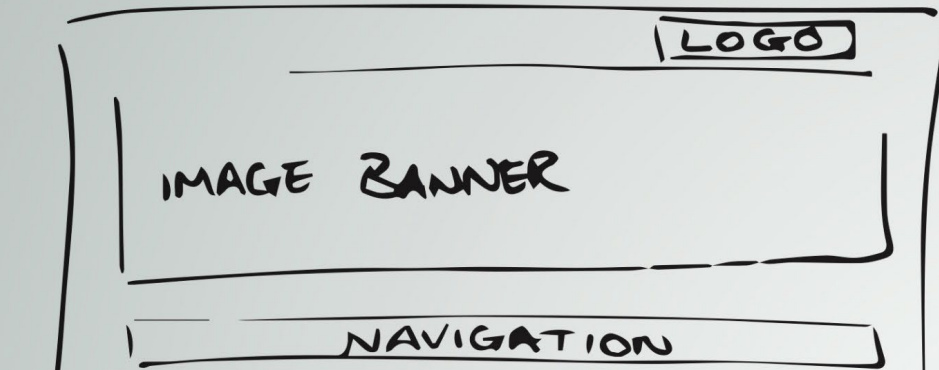
- FAQs
- Forums
- Image Gallery
- Site specific globals
- Support Site

Significant Module Improvements

- Banners (Next Gen Images)
- Content Includes (across modules)
 - Alerts
 - Decision Tree
 - Forms
 - Jobs
 - Rates
 - Slideshow
- File Manager (Next Gen Images)
- Forms/Form Submissions
- Sidebar Content (accordion)*
- Site Restriction Controls
- Slideshow (Next Gen Images)
- Tables (future replacement of Rates)

* Requires Bootstrap Enabled Site

Homepage



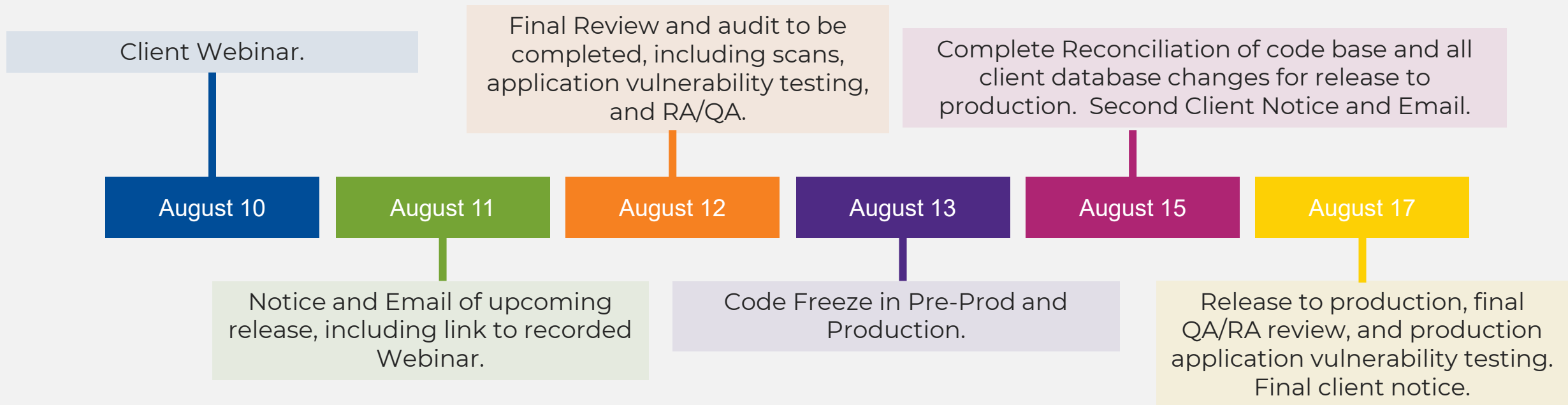
Release Date

Estimated: August 17, 2022

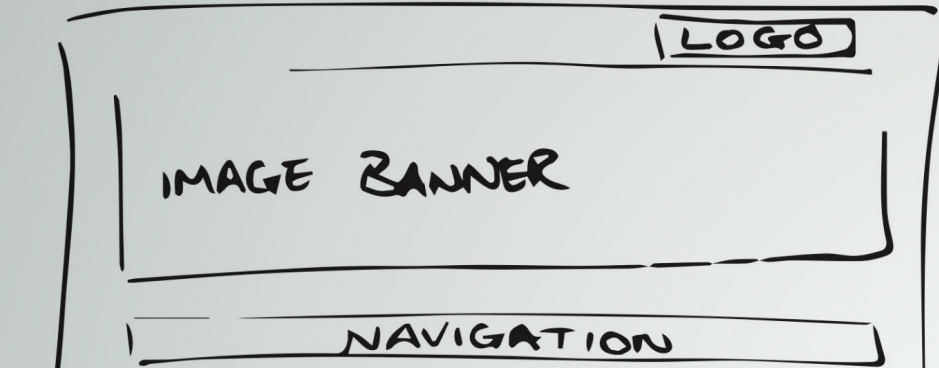


Release Timeline

Below is the release timeline, subject to change, based on testing results and requirements for any final remediations.



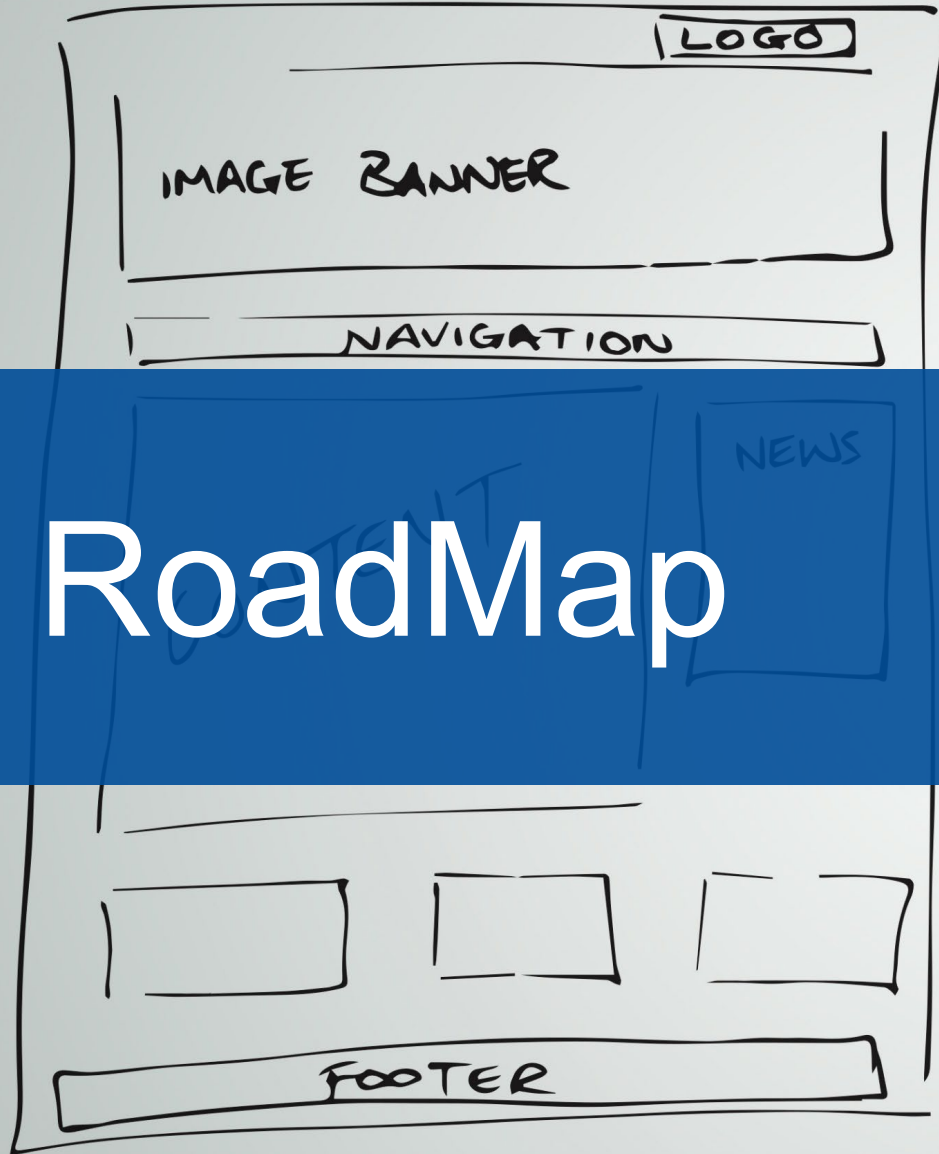
Homepage



Release Updates: Q&A



Homepage



RoadMap



Roadmap, Next Release: Version 6.60

New Modules/Components

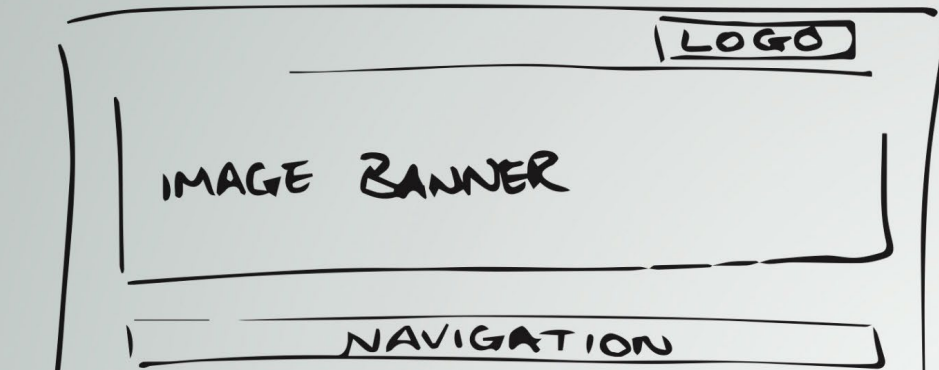
- Google Analytics 4 Integration
- In Context Guides (exploratory, incremental)
- Member Communication Center
- Personalization*

Significant Module Improvements

- Additional Calculators, Lead Generation Engine, Results Report
- Content Library for Articles/Blogs
- FAQs: Category Suppression
- Image Gallery (Next Gen Images)
- Internal Search Reporting
- Next Generation Images: Content/Regions (exploratory)
- Table Module single rate integrations into Calculators and other widgets

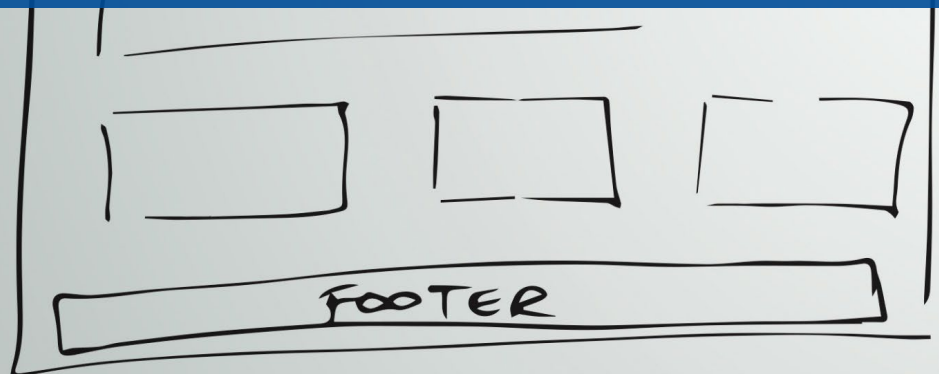
* Requires Slideshow

Homepage

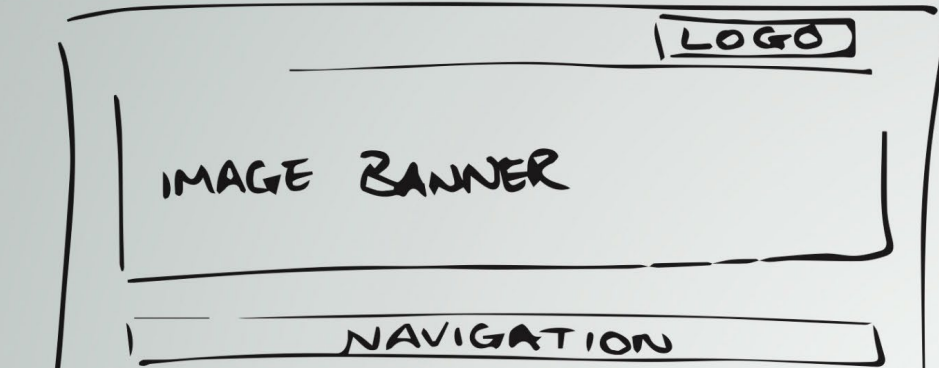


Next Release

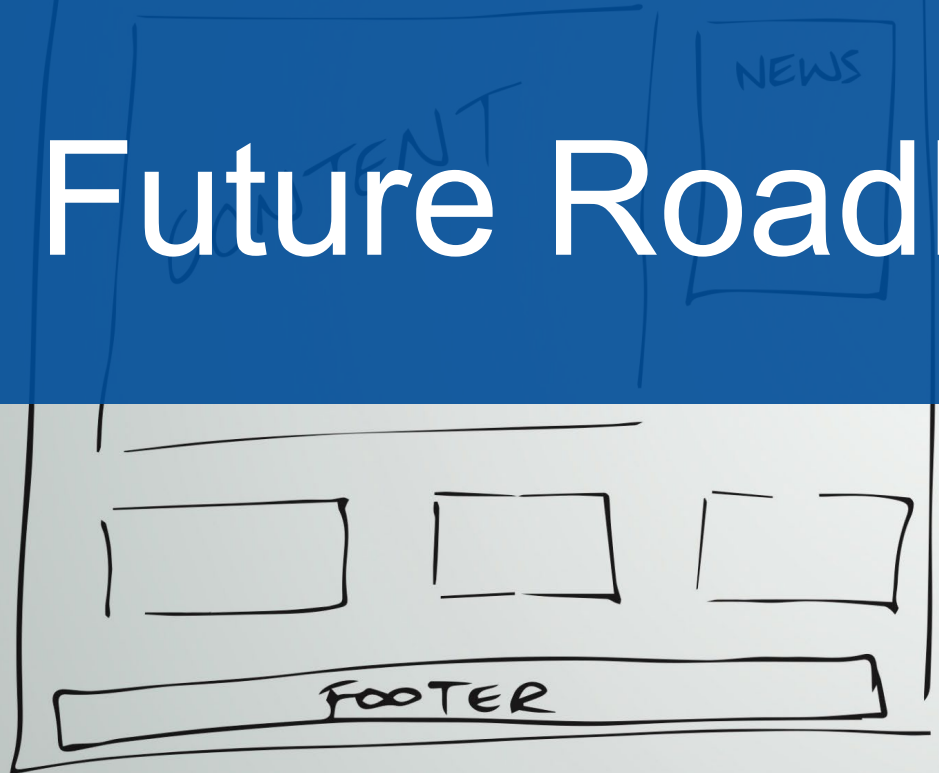
Estimated: September 12, 2022



Homepage



Future RoadMap



Future Roadmap: Under Consideration

New Modules/Components

- A/B Testing
- CRM integrations
- Image Editing
- Inline Editing
- Marketing Automation Integrations
- Member Onboarding Integrations
- Rate Watch Feature
- Surveys

Minor Tweaks

- Support Site

Significant Module Improvements

- FAQ: Review and Revamp
- Jobs: Review and Revamp
- Locator: Moneypass API integration
- Personalization: Extension to additional modules
- Personalization: Geo-located targeting

Future Roadmap - Ancillary Service Integrations @ CUSG

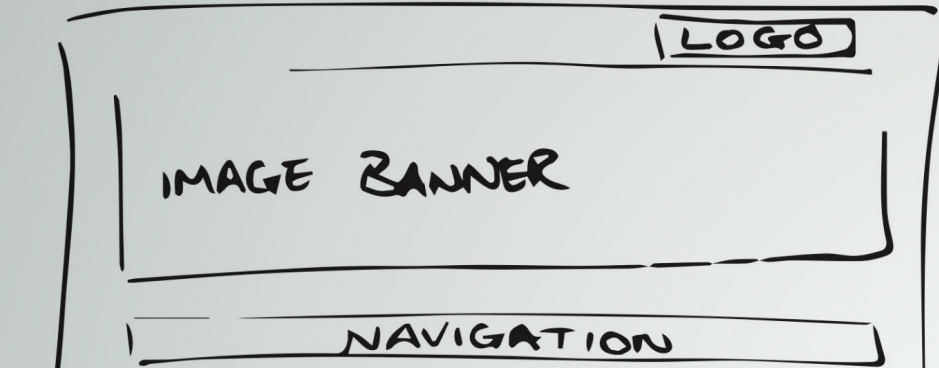
ROUNDING OUT THE FULL DIGITAL MEMBER EXPERIENCE

CTS is working with Marketing Solutions to offer additional services and solutions to create a comprehensive approach to the credit union's full digital footprint, driving education, solutions, products, and other forms of journey-based communications, deepening the relationship with members, as well as engaging potential members.

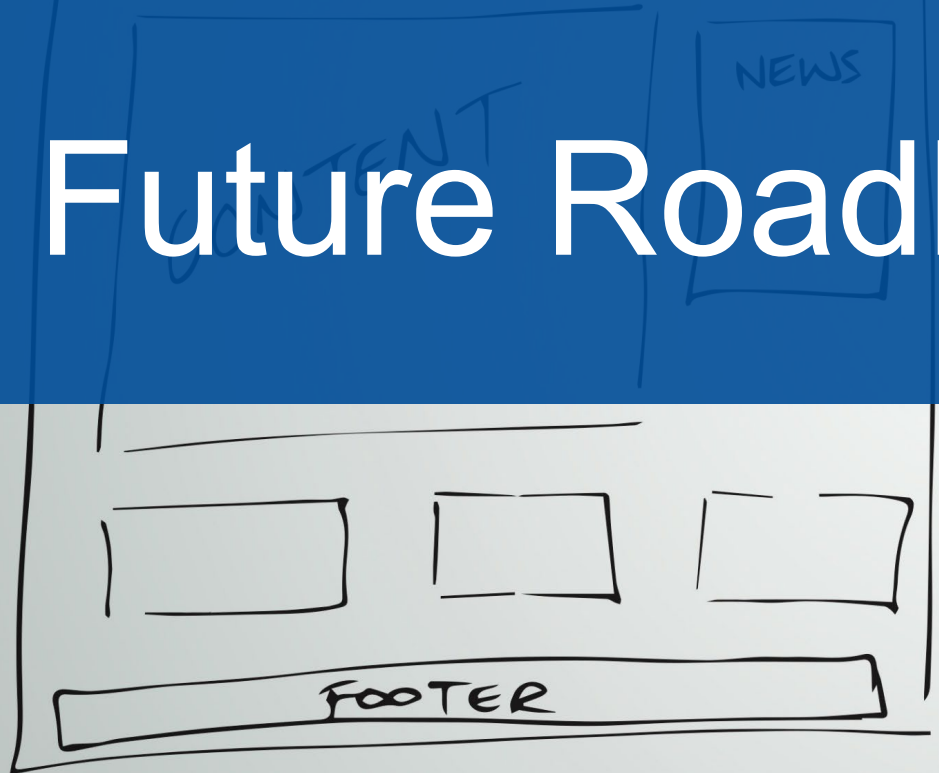
- Brochures, Member Onboarding, CRMs, and many other solutions/services.
- Campaign Services: one off or comprehensive campaign planning and execution.
- Content Writing: concise, authoritative voice to drive SEO, the client emotional experience, and strong CTAs to drive member engagement.
- Digital Marketing solutions: driving traffic for defined strategic objectives, with a strong and measurable ROI.
- Marketing Automation: creating automated member journeys with defined triggers and marketing flows to deepen product/solution usage and member engagement.
- Member Experience Solutions: help credit unions create brand-defining member experiences through Voice of Member feedback collection and a powerful, industry-specific analytics platform.
- Video content to augment financial education throughout the primary Web site, ancillary sites, Social Media, and other electronic communication channels: cubeTV production and content integrations.



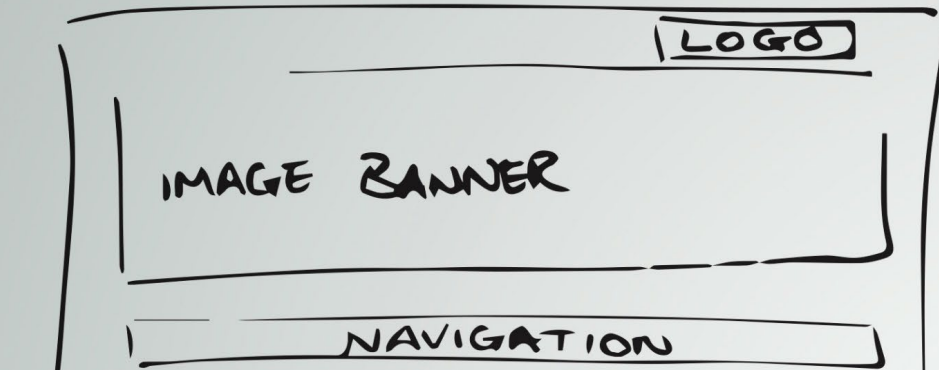
Homepage



Future RoadMap Q&A



Homepage



Client Feedback



Thank You.

