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CU*South Appoints Senior Conversion Manager

Mobile, AL – October 23, 2009

CU*South has announced the appointment of Roger Walker as its Senior Conversion Manager.

With 19 years of experience managing core processing for credit unions, Walker will lead a new Conversion Team that includes a mix of experienced leaders and credit union product experts. "A successful conversion requires the leadership of someone who has worked in every area of credit union operations and has an instinctive sense of how all the pieces come together," says CU*South's CEO, Leo Vaulin. "Roger Walker has managed daily operations for dozens of credit unions across different core platforms and servers – it's like watching a symphony conductor get a perfect performance out of every part of the orchestra. If something doesn't seem right, he knows right where to look and how to correct it."

Walker's Conversion Team follows a conversion methodology first developed by CU*Answers, a partner CUSO. "It's called '**The Conversion Promise**' – for a good reason," says Walker. "The team follows a script that provides consistency in every step. There are over 175 steps in the project plan, and each one must be done in the correct sequence. We use a combination of Microsoft Office and some custom web-based collaboration tools to pull everything together and make it readily available to everyone on the team. We work hard to ensure a smooth conversion for our clients – and for their members. For members, the best conversion is the one they don't notice, except to say, 'Hey, I love that new online banking system!'"

Good staff training is the key, and Walker relies on CSR Manager and lead trainer Starla Honea to assemble a custom training plan that's a perfect fit for credit unions both large and small. Jason Martin, CEO of First Neshoba FCU recently converted to CU*BASE. "CU*South developed a 10-week program that combined self-paced online training with interactive webinars, plus two weeks of dedicated classes in our board room. The trainers were very professional, and our staff of nine was enthusiastic about learning the new software."

"Sometimes the smallest credit unions present the biggest training challenge," says Starla Honea. "When you have three or four people doing all the work, it's tough to get everyone together in a training room at the same time." Starla's solution to this is a greater focus on one-on-one interactive

webinars. "Webinars take the stress out of scheduling training", she explains. "I can schedule a 90-minute lending class, and we have to make a last-minute change because the loan officer was busy. With webinars, there's no investment in travel, so I can easily reschedule without any extra expense."



Walker takes it all in stride. "We're coordinating eight departments in the conversion process – programming, education, product delivery, systems, networking, operations, forms design, and marketing. We build enough free time into every conversion schedule to allow each client the flexibility they need to get ready, while still getting their work done day-to-day."

With new conversions scheduled every 6 to 8 weeks, Roger Walker is looking forward to the new challenge.

About CU*SOUTH

CU*South is a CU-owned cooperative focused on building a network of successful credit unions. CU*South offers a wide variety of services for credit unions including its flagship CU*BASE processing system in both an online (ASP) and in-house environment, and Internet development services featuring the **It's Me 247** online banking product. As a partner of the cuasterisk.com network, CU*South provides the most comprehensive offering of information technology tools and services through a collaborative, shared ownership model. "Over 500 credit unions build their success on the tools and technologies we offer. We give our client-owners the same great value they offer their own members, giving them the opportunity to invest in the success and security of their credit union," says CEO Leo Vaulin.

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