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Mobile Postal Employees CU Signs With CU*SOUTH

An Emphasis on Workflow Automation and Managed Services

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CU*SOUTH, a CUSO providing core data processing services, announced that Mobile Postal Employees Credit Union (MPECU) has signed a contract and will convert within the next 2 months.

Joyce Harrison, CEO of MPECU, joined CU*SOUTH's CEO Leo Vaulin at the CUSO's Mobile, Alabama, office to plan the training and conversion process. "We're delighted to be upgrading our core software to the new CU*BASE system," says Ms. Harrison. "Our credit union is small – only 3 employees. Every member of staff needs to be able to do just about everything. The workflow tools in CU*BASE will make it easier to cross-train and ensure that proper procedures are followed consistently."

"CU*BASE is a perfect fit for a small credit union," says Mr. Vaulin. "Our Workflow Controls let you manage what steps a teller or MSR uses when setting up new memberships and sub-accounts, such as pulling a credit report or enrolling in e-statements. In our Loan Application process, our Workflow Controls specify which documents are required for each type of loan. The system manages an electronic checklist of what's already been received, and what's still pending. This makes it easy to cross-train a teller or MSR on loan processing – free your underwriter from all the paper-handling."

Ms. Harrison agrees. "Today, our staff uses paper 'cheat sheets' to help them remember the details of our products and services, our policies and procedures. CU*BASE will let us automate many of the procedures, and the 'cheat sheets' will be stored online in the CU*BASE system".

"CU*BASE features an extensive collection of Procedures and Marketing Tips," explains Mr. Vaulin. "Let's say you're thinking of offering a new type of savings account. You can start by defining the online Marketing Tips – how will your staff promote this product? You want a consistent message – on your website, your newsletters and e-mails, your online banking screens, and on the lips of every employee. From a single screen, you manage that how that message gets delivered. Even if you outsource your Call Center, you're still projecting a consistent, professional message."

"Stumped for creative ideas for your Marketing Tips? CU*BASE comes with a master Talking Points library that contains hundreds of small paragraphs of text covering topics ranging from share and

certificate products to service fees and the benefits of credit union membership. Talking Points are little “sound bytes” of information you can use when talking to members about your credit union’s products and services. You can copy as many of the paragraphs as you like, in any order, into the product Marketing Tips, Procedures, and Online Banking Sales Info pages for your credit union products.”



Another challenge facing small credit unions is how to maintain staffing – what do you do if one person is on vacation and a second person is out sick? Ms. Harrison discussed this problem with Mr. Vaulin.

“CU*South offers Managed Services to credit unions who find that’s it’s just not cost-effective to hire full-time specialists in every department,” says Mr. Vaulin. “If you’re down to a single employee, you want that person to focus on the member-facing tasks – they can’t afford to worry about back-office or collections. We offer specialists in accounting, compliance, collections, underwriting, marketing, Call Center – you name it, and we can deliver that service for less than the cost of a full-time employee.”

“Our mission is to grow credit unions, especially by helping the smaller CU’s who feel like they’re stretched too thin already. As a Credit Union Service Organization, our focus is on finding low-cost ways to promote collaboration. For example, we can assign an accounting specialist – a top performer – to manage the back office work of up to 8 credit unions a day – and offer this service for \$200-300 per week. That’s a small price to pay for a high-quality, consistent product that’s delivered daily – just imagine the peace of mind this brings!”

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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