

Backbase

NFCU Innovation Day

Agenda

Objectives of Innovation Day Working Sessions

01

Elevating the Conversation

- Align with NFCU on key organizational strategic objectives (1-3 year outlook)
- Align NFCU objectives with Digital platform applications that can support achieving these goals

02

Solving Challenges, Unlocking Opportunities for NFCU

- Explore key pain points or opportunities to improve driving value to members while identifying opportunities to unify NFCU digital ecosystem

03

Reimagining the Future Together

- Co-create a joint roadmap for NFCU priorities with Backbase, ensuring seamless integration and measurable impact.

NFCU - Backbase Innovation Day

DAY 1

Session 1

AGENDA

26th March | 10h00 - 13h00

01. Welcome, Introduction & Context Setting | 15 min

02. ELEVATING CONVERSATION: Setting North Star | 30 min

Approach the NFCU Platform strategy to **start with the vision** shifting from “Project” focus to “Value” focus with Cascading Choices

- **NFCU and Backbase to discuss vision/strategy** (takeaways from “voice of customer calls” with NFCU)
- **Backbase to summarize** Key strategic themes and cascading choices

03. ELEVATING CONVERSATION: Art of the Possible | 45 min

- Backbase to share global FI market strategies and trends (case studies/inspiration on forward looking tech like gen AI)
- Backbase platform overview (strategic investment to forward looking technology/use cases)

|| WORKING LUNCH || 12h00 - 13h00

04. NEW SOLUTIONS: Exploring NFCU Use Cases | 90 min

- Explore operational challenges & objectives, digital health map & demonstrating member value.
- **Team Exercise: Develop a key use case library**
- **Take Away Assignment (Audience): Prioritization of use case library**

DAY 1

Session 2

AGENDA

26th March | 14h00 - 16h00 (TBD)

01. REIMAGINE FUTURE: Solutioning | 120 min

- **Architectural Fit:** Backbase platform -areas to optimize utilization of current architecture and ability to replace/integrate/leverage
- **Integration Strategy:** MSFT dynamics, Genesys, Identity. Oneview integration methods; Implementation, maintenance and scaling of APIs
- **Exercise:** Prioritisation based on implementation complexity

DAY 2

AGENDA

28th March | 10h00 - 13h00

01. Quick Wins & Prioritization | 30min

- **Exercise:** Rank features presented according to urgency & importance

02. REIMAGINE FUTURE: Tailored Demos | 120 min

Examples:

- **Solution Demo:** Tailored member proposition based on life events
- **Solution Demo:** Member Lifetime Orchestrator
- **Solution Demo:** Agentic AI driven member servicing
- **Solution Demo:** Fintech marketplace partnerships and integrations
- **Solution Demo:** Transaction disputes Mastercard-Ethoca digital receipts

|| LUNCH || 12h00 - 13h00

03. REIMAGINE FUTURE: Prioritization & Next Steps | 30 min

- **Next steps Planning:** Creating an action plan to validate the roadmap and business case for further socializing..

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02

Preparation Workshops

Backbase -NFCU Collaboration



7-10 hrs

Summary of the Engagement Plan | Key points



Focus on Innovation Day

Backbase engagement will be focused on presenting tailored proposition for NFCU



'V' Approach

We will start with executive statements, drill down on key themes at operational level and present it back during executive readout



6 Hours of Investment

Required for **meetings** (workshops, strategy & business alignment, branch, call center & IT) depending on agreed duration



High level data intake

We will collect high level data around customer journeys, processes and technology to develop business value



Tailored Content

Backbase will create tailored case studies, assessments and solutions /demos as per the NFCU strategic themes & challenges



Validation by March 10th

Report and solutioning ready for executive read out by **first week of March**

Preparation Sessions (Pre Innovation Day)

SI no	Domain	Workshop agenda/ outcome	Client Participants	Onsite /Remote	Duration	Proposed Dates
#1	Executive/business goal Alignment	Understanding of executive vision, strategy, goals and challenges	Digital Leadership: Member Experience and Technology - Tim and Gautam	Remote	1 hr	Feb
#2	Digital Product Workshop	Understanding and assess digital maturity of relevant Member Experiences	Digital Leadership: Member Experience and Technology - Tim and Gautam Optional: Business Product Owners	Remote	1 hr	Feb
#3	Branch & Call Center Servicing workshop	Understanding and assess operational challenges, key journeys & use cases	Tim ++	Remote	1 hr	TBD
# 4	IT Operations & Architecture Priorities	Understand, IT operating model, current challenges, goals and IT maintenance costs	Enterprise architect, business users of application: Gautam-+ team ad ETS	Remote	1 hr	TBD
# 5	Pre Innovation Day -Read Out	Debrief of Onsite Workshops	Kathy, Gautam and Tim	Remote	1 hr	TBD