

# Backbase

B|E|C|U

## Ignite Engagement Plan

Ignite Dates;  
12 -13 January 2026



01

## Ignite Day Objectives

Elevating the Conversation

# Objectives of Ignite Lab Working Sessions

01

BECU Strategy & Backbase Fitment

- Align with BECU on key organizational strategic objective & how **Backbase fits**
- Identify **differentiating strategies** & use cases and Backbase fitment

02

Align on Prioritization for Roadmap and 2026 F&F Live

- Value & complexity based prioritization for **BEAU roadmap**
- Define scope for **2026 F&F go live**

03

Creating Architectural & Implementation Blueprint

- Create **target architecture** with key dependencies & effort areas
- Plan for **implementation of 2026 go live** and create WBS

BECU - Backbase Ignite Lab

02

## Ignite Day Agenda

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12th & 13th January Schedule

# Ignite Lab Agenda (5 Hrs)

Day 1: 12th Jan

## 01. Welcome & Introductions (~15 mins)

## 02. BECU Strategic Themes (1 Hr) (BECKU & Backbase)

Backbase to share their understanding of BECU strategy & how Backbase is aligned to their long term strategy and short term goals

## 03. BECU Use Cases -(Member Experience) (2 hrs) (Backbase VC/SE)

Backbase to showcase product alignment with BECU table stake & differentiating use cases discovered.

-----Lunch (1 Hour)-----

## 04. BECU Use Case Ideas (Employee Experience) (1 hr 30 min) (VC/SE)

Given BECU's digital ambitions and use cases & Backbase product fitment, explore operational challenges & objectives from the employee experience perspective

**Day 2: 13th Jan**

# Ignite Lab Agenda (5.5 Hrs)

## **01. Recap from Day 1 (30 mins )**

## **02. BECU Architecture Fitment (1 hrs 30 min) (Backbase-SE/SA)**

Architecture fitment and solutioning to evaluate technical feasibility of the use cases and call out gaps.

## **03. Use Case Prioritization (1 hrs 30 Min) (Backbase VC)**

Collaborate to prioritize use cases based on business impact and complexity

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## **Lunch (1 Hour)**

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## **04. Implementation discussion planning(1 hrs) (Backbase Services)**

Discussing key milestones & requirements for implementation plan & proposal

## **05. Plan of Action & Wrap up(1 hrs) (Backbase Sales/CS)**

Create an action plan for follow ups, technical solutioning & implementation plan

# Pre-Ignite Preparation Sessions (remote- To be conducted before 10th Dec)

## Workshops Request

Sl no	Domain	Workshop agenda/ outcome	Client Participants	Status	Duration	Proposed Dates
#1	Executive/business goal Alignment	Understanding of executive vision, strategy, goals and challenges (customers ,employees & IT )	Digital Leadership: Member Experience , Branch & call center operations and IT	Done	1 hr	First Week of December
#2	Member Experience Workshop	Understanding and assess digital maturity of relevant Member Experiences	Digital Leadership: Member Experience a Optional: Business Product Owners	Done	2 hrs	First Week of December
#3	Branch & Call Center Servicing workshop	Understanding and assess operational challenges, key journeys & use cases	Digital leadership, Branch/Call center operations	15th Dec	1 hr	Second Week of December
#4	IT Architecture & Operations Priorities	Understand, IT architecture, operating model, current challenges, goals and IT maintenance costs	Enterprise architect, business users of application:	Done	1 hr	Second Week of December
#5	Current APP Demo from BECU	BECU to demo current app experience on member & employee side	Digital Team	Done	1 hr	Second Week of December

## Document Request

Sl no	Document	Description
#1	Digital Strategy Document	Banks' digital strategy, objectives, key initiatives and challenges
# 2	Member Research	Customer research with segments and persona
# 3	Enterprise architecture diagram	Explaining key applications in architecture and use cases

## 03 Preparation Workshops

Backbase -BECU Collaboration

# Summary of the Engagement Plan | Key points



## Focus of Ignite Onsite

**12/13 Jan**

Backbase engagement will be focused on presenting tailored proposition & Backbase fit for BECU



## '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 BECU strategic themes & challenges



## Validation by January 7th

Report and solutioning ready for executive read out by **First week of January**

# Pre-Workshop Data Collection

## What data collection will we need?

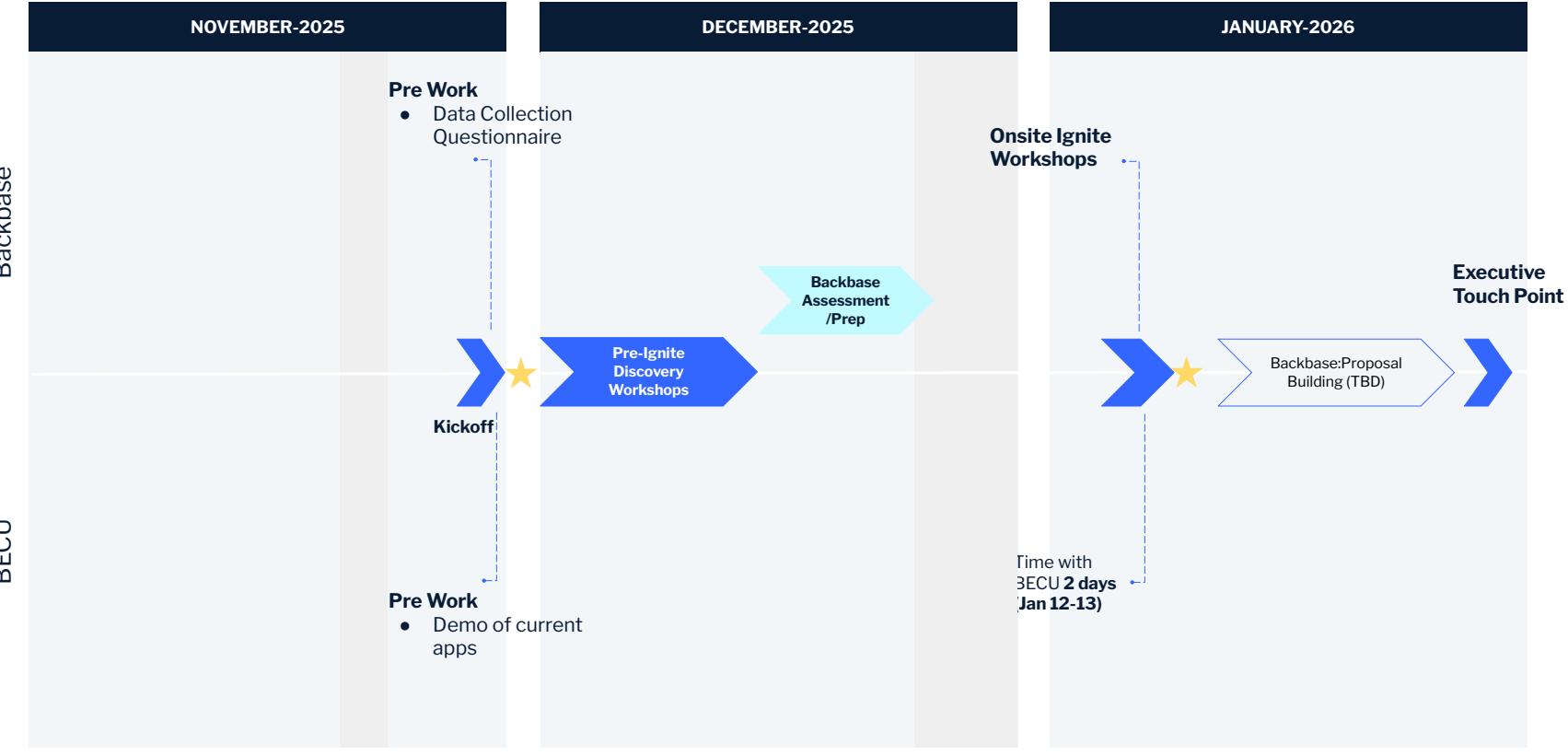
No	Request
1	Digital Strategy Document   Personas research (needs, pain gains)   Call center call volume data   Branch volume data
2	New dream state or Use Cases
3	Reverse Demo - Current Mobile Process/Journey Flows (loan origination, servicing)
4	Enterprise and IT Architecture Diagram
5	Evaluation that has already been done on Tech assessment of current apps
6	Backbase questionnaire (business & customer metrics)

BECU Existing Documents

- Strategy documents
- Member segmentation
- Call Center reports
- Business Process Flows & IT

Backbase Questionnaires  
(Backbase to Share with BECU)

# Proposed Plan & Timeline



## 04 Final Deliverables



# Introducing IGNITE

Key Deliverables for BECU:  
Strategy to Execution

## BECU Strategy -Usecases & Backbase Fit



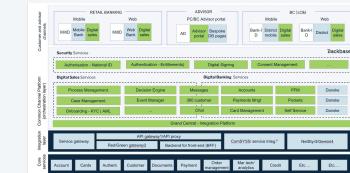
## Roadmap aligned to business value



## Uncover Differentiating & AI Use Cases

The image shows a mobile application interface for financial management. At the top, it says 'Financial buffer' with a progress bar from '0\$' to '100\$'. Below that is a section titled 'Talk to your financial coach about your savings goals:' with three sub-options: 'Ramping up your financial buffer', 'Creating a budget', and 'Reviewing your monthly expenses'. The main screen has sections for 'Ramping up', 'Creating a', and 'Reviewing your'.

## Architecture Blueprint



# THANK YOU

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Backbase