

IMPACT 2022

CORNERSTONE ANNUAL MEETING & COUNCIL FORUM

**The good, bad and ugly of launching
your credit union data journey**

Anne Legg, Founder
THRIVE

Host

Educate/Accelerate/Elevate

Anne Legg

Founder

THRIVE

Recognized, award-winning industry expert, author, educator, member-centric data strategist who holds an MBA thesis on the credit union business model.

Worked with over 600 credit union leaders across the United States helping them launch their data journeys.

Lead Data & Analytics Faculty for Southwest CUNA Management School



Session Objectives

1. Essentials of data success
2. Explore three data journeys
 - a. Rosie
 - b. Nike
 - c. Indy

Data Success Continuum

The 5 domains needed for enterprise data success



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Rosie

It is what we CAN do,
Not what we can't

Brandi Boney

Loan Officer & General Ledger Specialist

Local 20 IBEW Federal Credit Union

Grand Prairie, Texas

\$7.24 million Assets

Data Systems:

Core: FIS mercury

Card: PSCU





Nike

Just DO it!

Georgette Salazar

VP of Member Experience

Cy-Fair FCU

Huston, Texas

\$550 million Assets

Data Systems:

Core: Symitar

Card: PSCU

Payments: Zelle



JUST DO IT.



Indy

An Experienced
Data Journey Explorer

Joe Slitzker

VP of Tech & Innovation
TTCU
Tulsa, Oklahoma
\$2.1 Billion Assets

Data Systems:
Core: Corelation – Keystone
Azure Sequel
PowerBI
Qualtrics

(and more than we can fit on this page)



**THANK
YOU!**

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