POPi/o User Group Meeting

June 2021

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Agenda

- Welcome
- Company Update: Jed Taylor, President
- Marketing: Brandon Butterfield, Chief Marketing Officer
- Product Overview: Ryanne Mayers, Product Manager
- Cobalt Credit Union: Sara Schroeder, Video Banking Manager
- Customer Success Team Updates and Wrap Up: Kurt Forsberg, VP Customer Success

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Company Update

Jed Taylor
President

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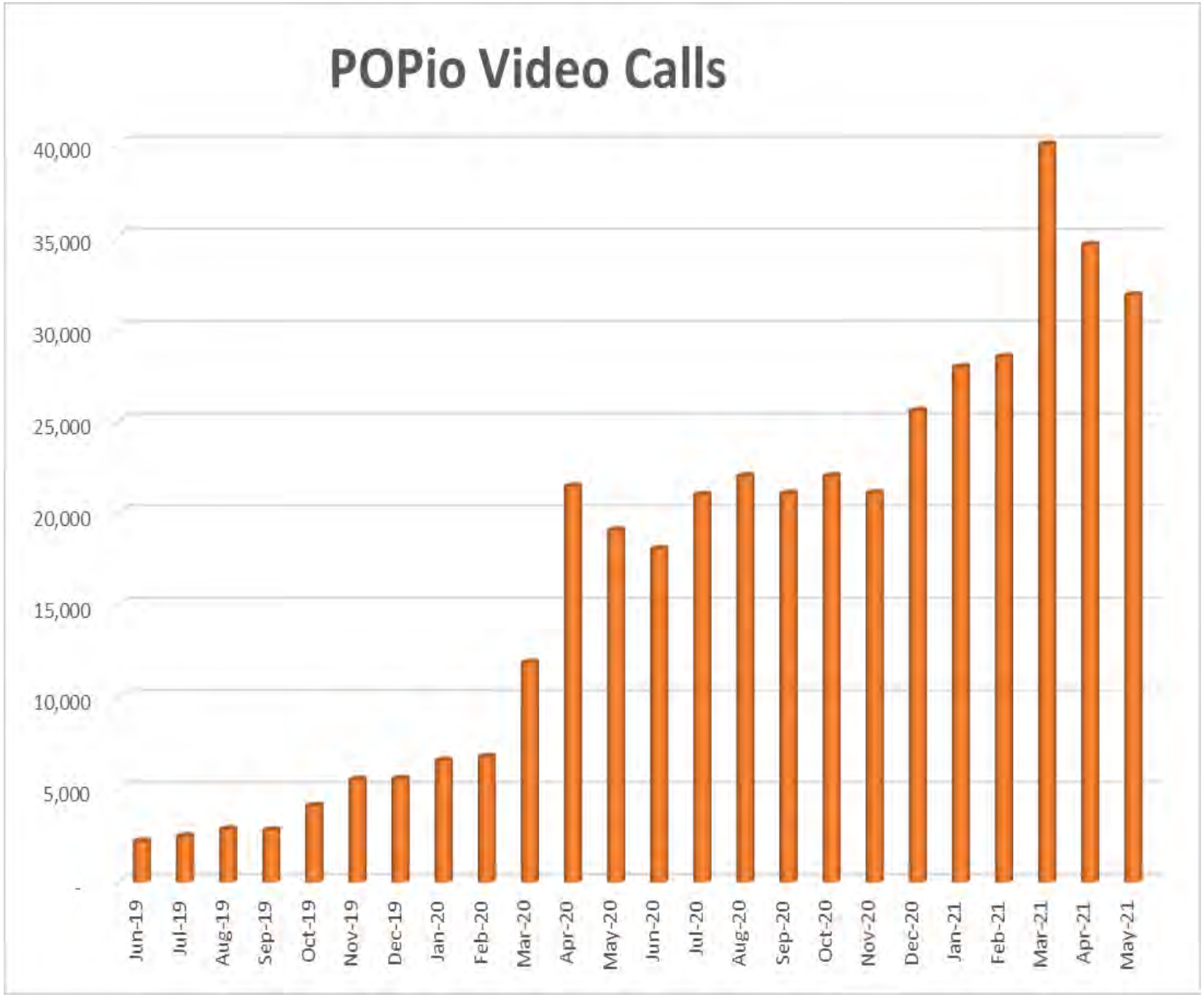
POPio Video Calls
40,000
35,000
30,000
25,000
20,000
15,000
10,000
5,000
-
Jun-19
Jul-19
Aug-19
Sep-19
Oct-19
Nov-19
Dec-19
Jan-20
Feb-20
Mar-20
Apr-20
May-20
Jun-20
Jul-20
Aug-20
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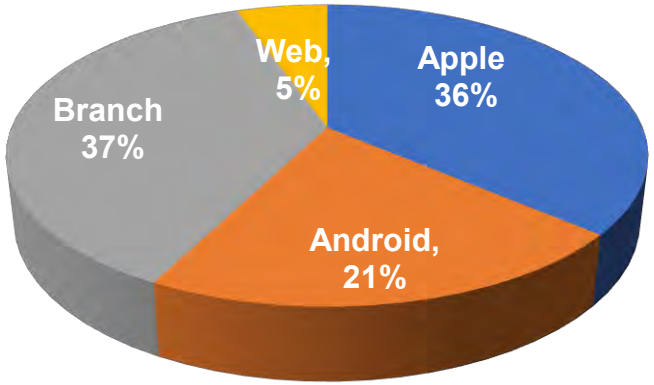
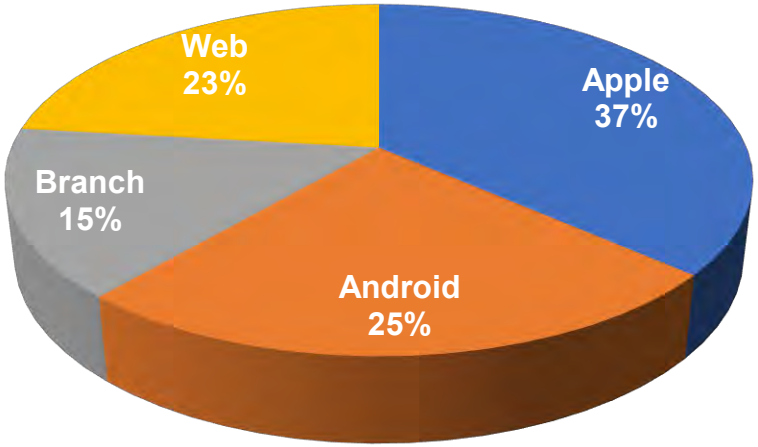
Nov-20
Dec-20
Jan-21
Feb-21
Mar-21
Apr-21
May-21

Shifting Usage During Covid

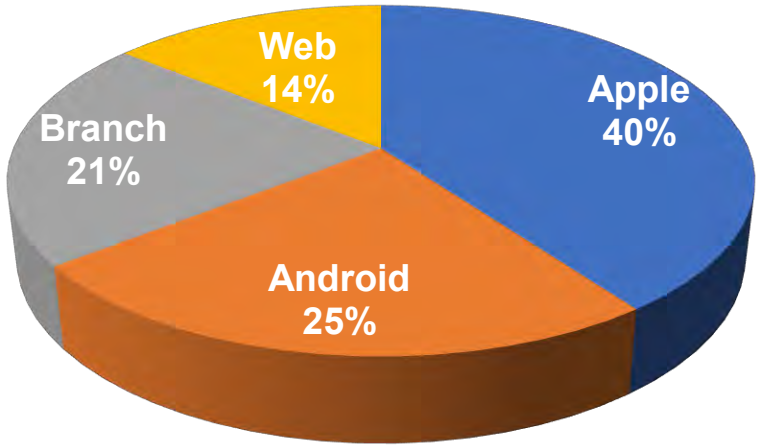
Oct-19



During Covid (Mar-June 2020)



May-21



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The True Cost of People

Self-Service Transaction Cost & Transition

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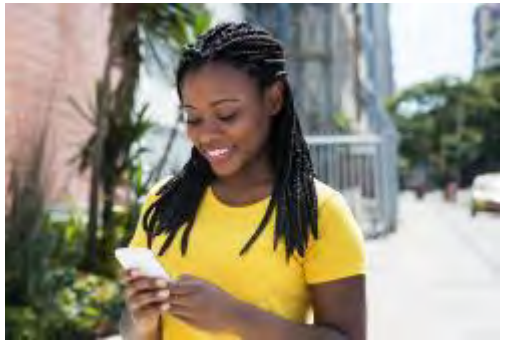
Bankers are important

People are important



It’s not a REAL Branch

without REAL PEOPLE

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Highlights

- #1 Mobile Video Banking Provider
- #1 In-Branch Video Provider
- Secure and Safe--SOC II Type II (2021)
- 10 US Patents, 2 new in 2020, 1 new in 2021
- Organizational Growth—Support team streamlining
- Continual Roadmap
- New Integrations w FI Systems (Scheduling Tools, ACDs, etc)

Thank You!

timetrade

Genesys Cloud

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POPio

Marketing Insights

Brandon Butterfield
Chief Marketing Officer

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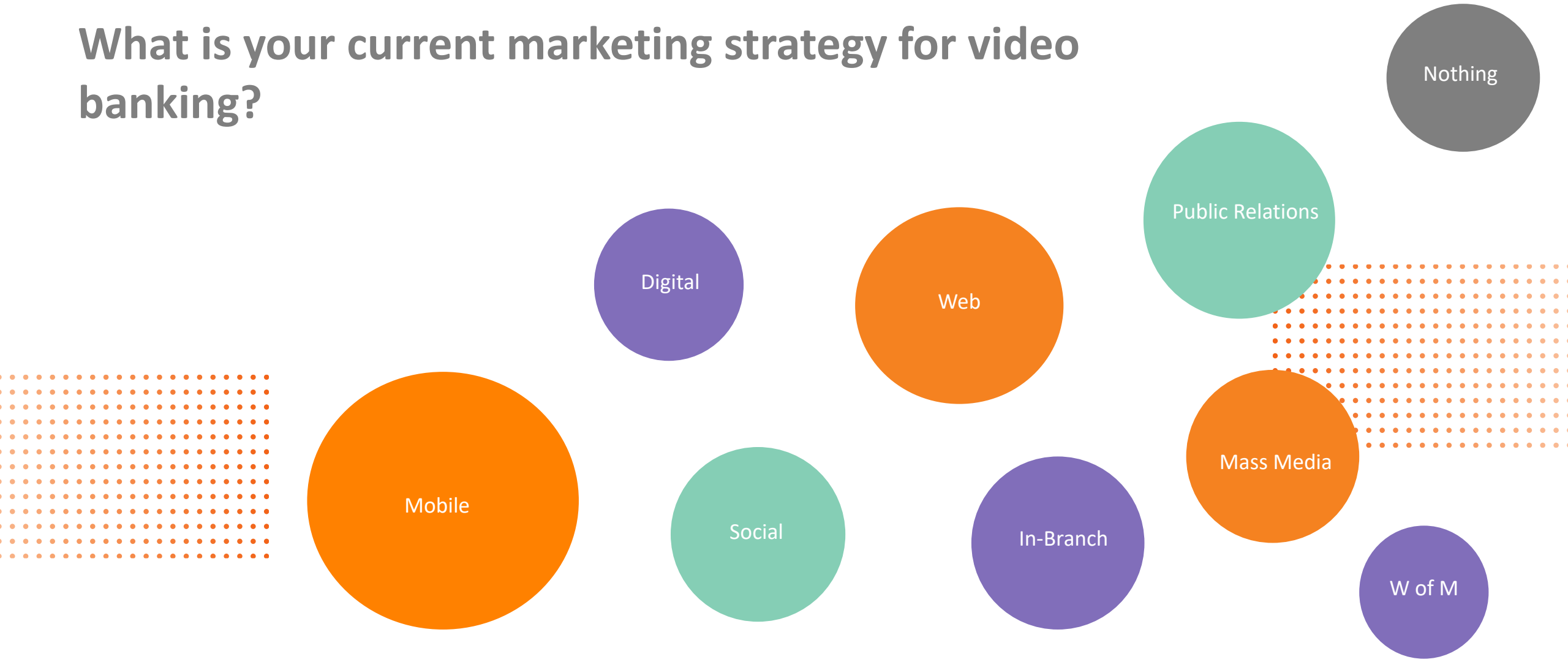
What is your current marketing strategy for video banking?



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Know, Think, Feel, Do

Know

What do you want the audience to know or learn?

Think

What do you want the audience to think?

Feel

What emotion or response do you want to evoke? What do you want your audience to feel?

Do

What action do you want your audience to take?

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Commercials

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Outdoor

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Community Involvement

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Social Engagement

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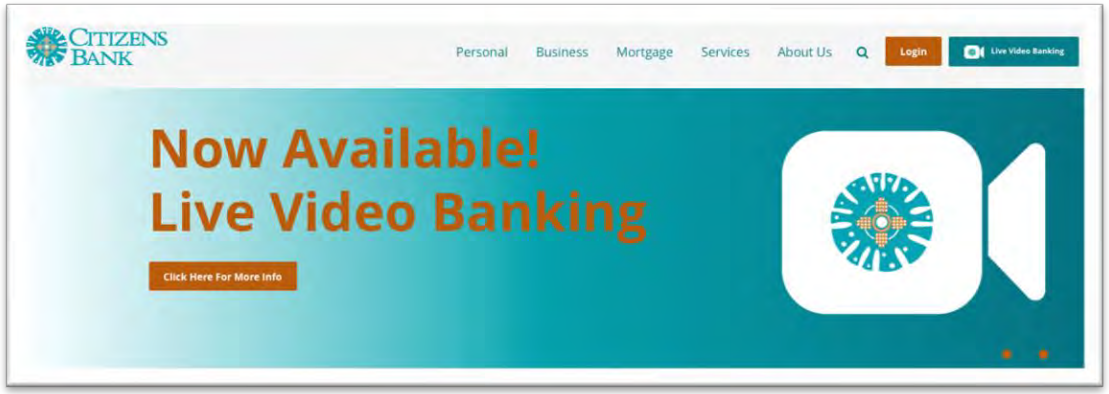
Website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Services
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Live Video Banking
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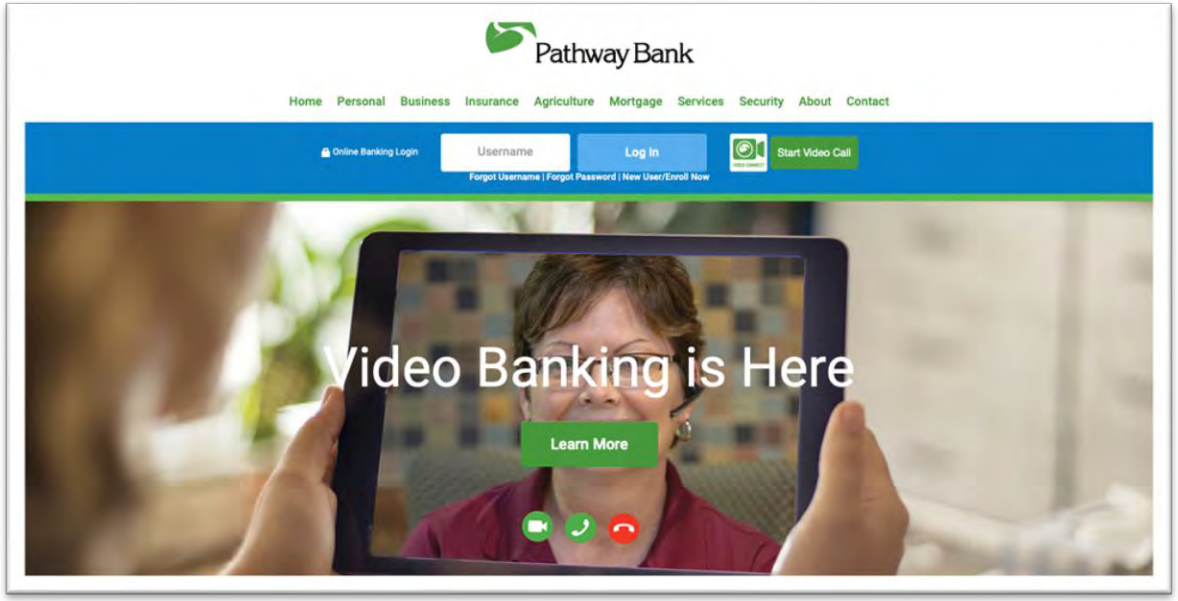
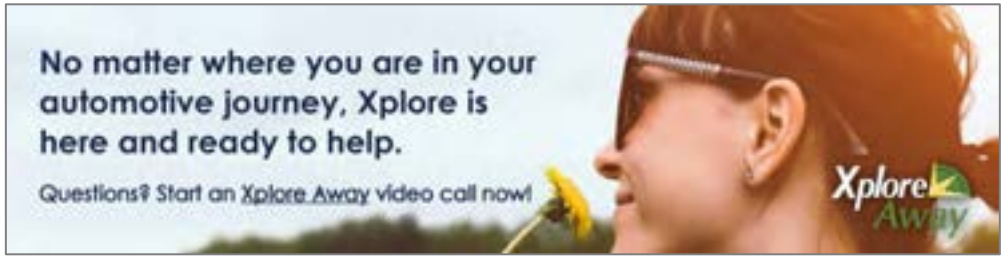

Pathway Bank
Home
Personal
Business
Insurance
Agriculture
Mortgage
Services
Security
About
Contact
Online Banking Login
Username
Log In
Start Video Call
Forgot Username | Forgot Password | New User/Enroll Now
Video Banking is Here
Learn More

SCHEDULE A VIDEO APPOINTMENT. WE'LL BE READY WHEN YOU ARE.
AFFINITY PLUS
HOME LOAN
Appointment • 60min
We'll discuss how to figure out how
NEW ACCOUNTS
Appointment • 60min
NEW LOAN
Appointment • 60min
Not for Home Loans

cobalt
Routing Number 304083448
Contact
About
Member Resources
COVID-19
Search
Español
Personal
Business
Membership
Community
Wealth Management
LOGIN
Video Banking
Banking
without leaving the couch.
cobalt
VIDEO BANKING
Get Connected
NCUA

Online Marketing



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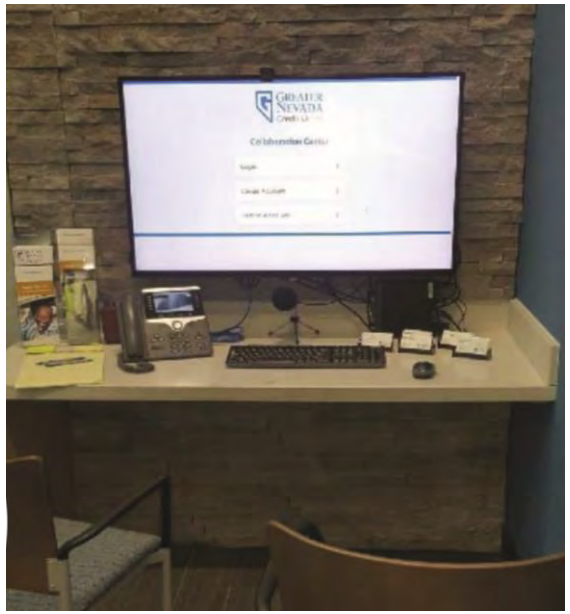
In-Branch



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Infomercials

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POPi/o

POPi/o Video Banking Solutions Client Experiences Resources Blog Request Demo

Marketing Resources

POPi/o Commitment to Help You

POPi/o is committed to providing you with the very best ways to market your video banking solution. We are a marketing resource always willing to help, share ideas, concepts, and provide the consultation you team needs and to guide you through the development of marketing and promotion of video banking to your consumer.

Below are marketing examples to see how others are marketing their solution and assist your team with creative ideas. We have provided design templates for your creative team to use or they can create their own that represents your brand.

POPi/o marketing team is available for consultation. To schedule a consultation with POPi/o's marketing represenative please, contact your customer success manager or onboarding specialist.

-CLICK ON AN ICON BELOW FOR MORE INFORMATION-

CUSTOMER MARKETING EXAMPLES UNBRANDED CREATIVE ASSETS MARKETING ASSETS

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How differentiated is your brand today?

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Q&A

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Product Overview

Ryanne Mayers
Product Manager

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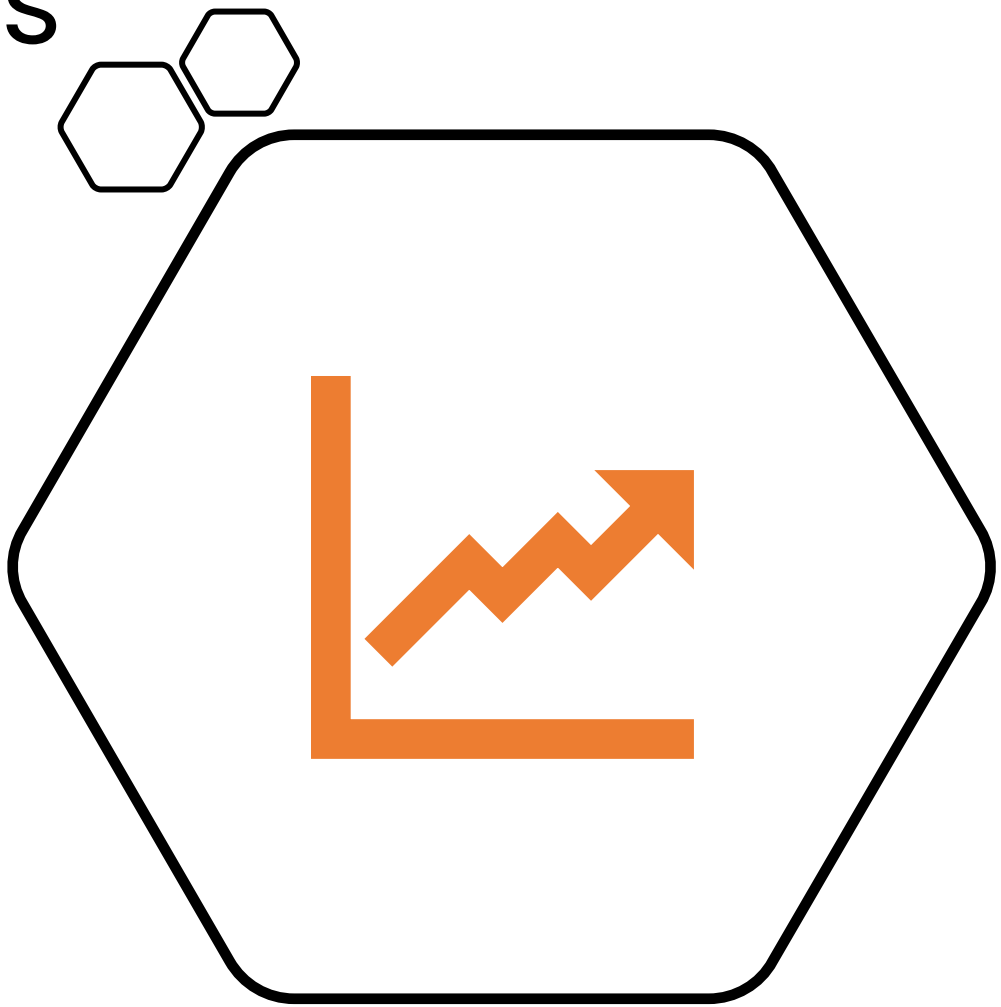
2021 Release Highlights

- Secure Data Export refactor
- New reports:
  - Contact Metrics
  - Performance Metrics
- Enhanced Security Features
  - Upgrade “blocked caller”
  - Panic Button (enabled in Call Settings)
    - Block IP Address
    - Block Device ID
    - Take snapshot of offender
    - Send “you are being reported” slide
  - Consumer “frosted video” filter
  - Name display settings
- Enhanced Video Check Deposit
  - Improved consumer experience
  - Ease-of-use for FI video agents
- Consumer privacy policy updates
- TimeTrade Integrations (Statement of Work required)



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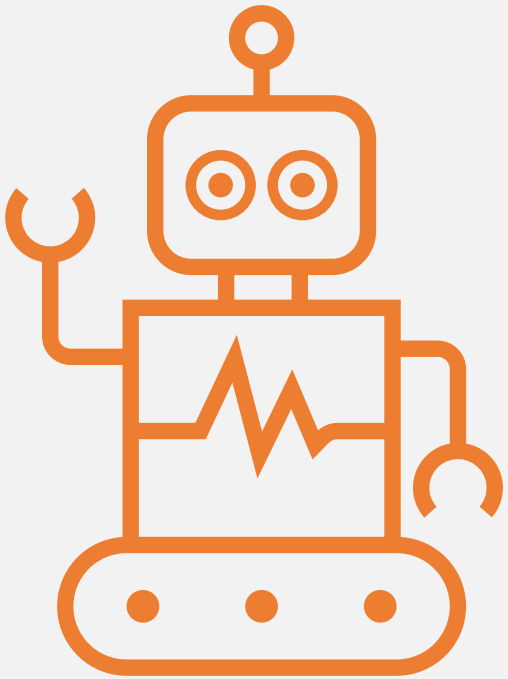
June 2021 Release



WCAG 2.0 Compliance
- Keyboard navigation – phase 1

Custom Survey Tools
- FI managed surveys
- Enhanced survey reporting
- Export survey data through Secure Data Export

Special Character Support
- EX: Hyphenated names, accent marks

Enhanced transfers
- Transfer to a group/team
- Cold transfer

Improved document uploads
- .PDF
- .jpeg
- .PNG

Styling Page Update

Timezone Display Update

POPwelcome Genesys Cloud Integration (Statement of Work required)

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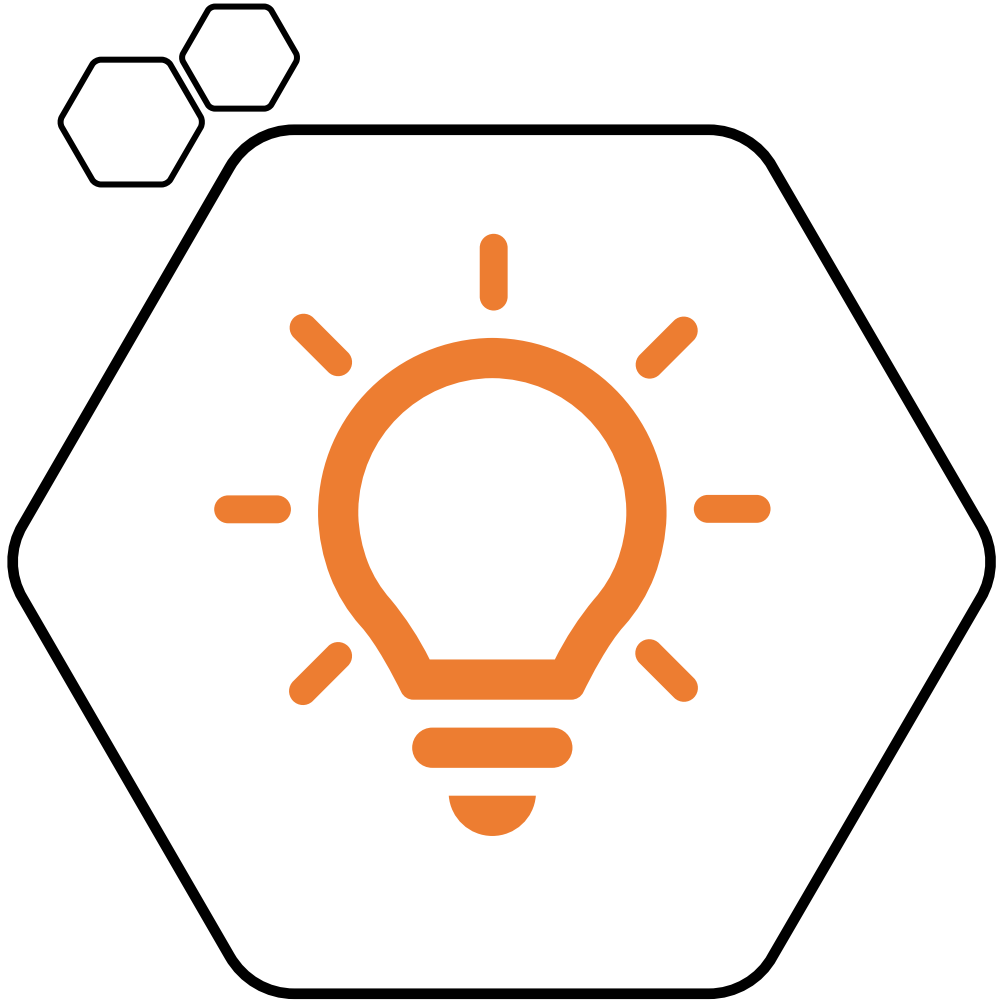
What we're working on

- WCAG 2.0
- Mobile co-browse
- Enhanced reporting
- POPverify
- POPnotary



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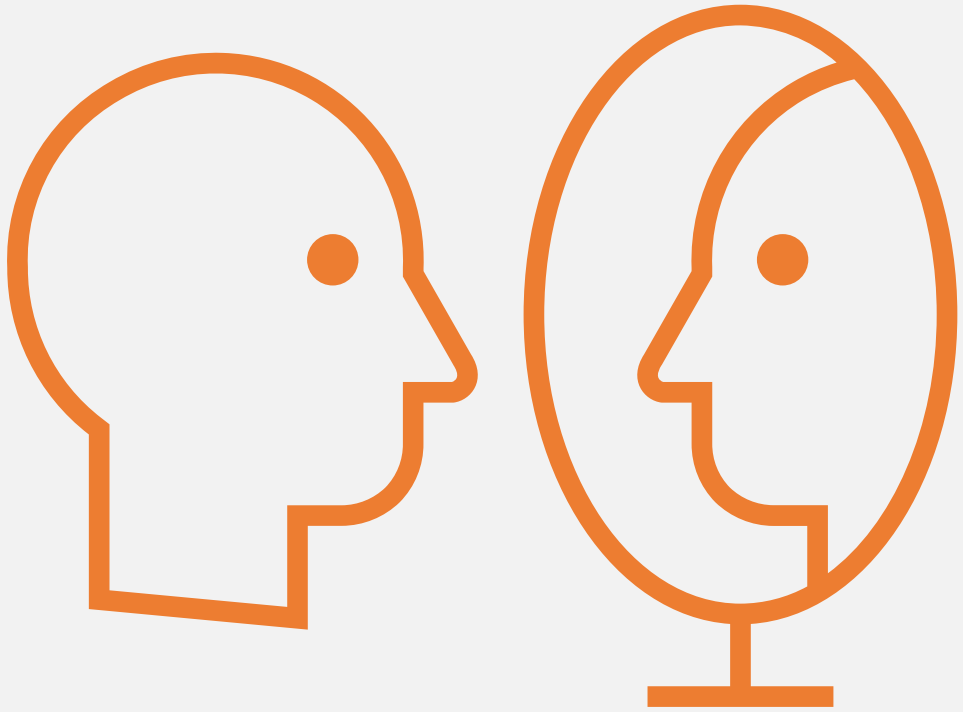
POPverify



The next phase of secure video banking is coming!

Leverage POPverify to:

- Scan and validate member/customer identification
- Prompt for dynamic knowledge-based authentication of your members/customers.

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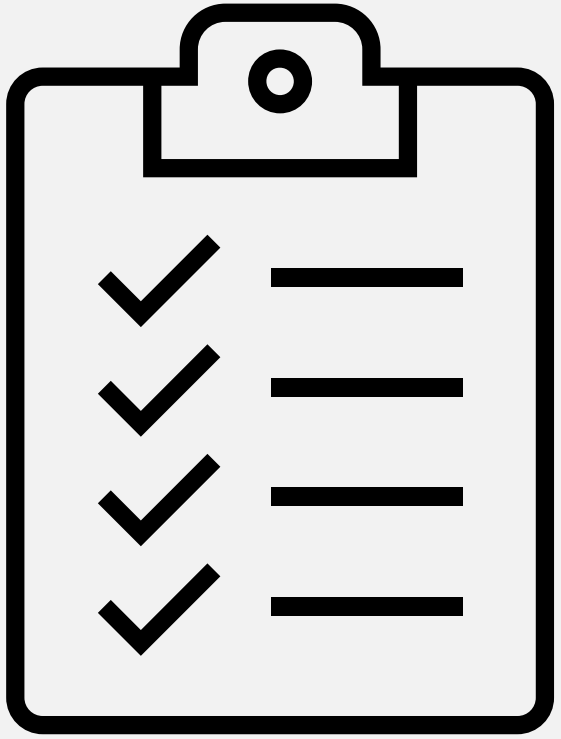
POPnotary

What you can do to prepare for POPnotary

- Every state has unique requirements for Remote Online Notary. Check with your state's notary commissioning office to learn more.
- Become a commissioned Remote Online Notary in your state
- POPi/o needs to ensure POPnotary is approved for use in your state, so if you're planning on POPnotary, let us know.



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Q&A

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Video Check Deposit

Enhanced, exception-based video check deposit

How it works:

- With a video agent, the consumer takes a snapshot of the front and back of the check
- Image is cropped and converted by Jaguar
- MICR, CAR/LAR are captured and verified by video agent
- Agent enters deposit account details
- Check is accepted and deposit is completed
- Receipt of deposit sent to consumer
- Track Video Check Deposits with reporting in POPi/o
- End-of-day x9.100 check file sent to FI check processor

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POPio Video Check Deposit

Sara Schroeder
Video Banking Manager

The Who.

- Cobalt Credit Union has 107,577 members.

The Why.

- In short, we wanted a way to fund our new accounts.
- What also happened, COVID. Our remote deposit limits were set at $2,500.00 pre-COVID and eventually increased to $5,000.00 (still current). Members wanted convenience of not leaving their current location to make a check deposit.
- When our lobbies closed in March 2020-June 2020, it re-routed most of our membership to the ITMs (Interactive Teller Machines) and the check deposit option on Video allowed us to still assist these members without them waiting in a drive thru line.

The Data.

- POPio went live on 04/2019. Web first, mobile apps live one month later.
- VCD testing started in 08/2019. VCD went live in 03/2020.
- Over 700 Check Deposits completed in 2021 alone. One check per workflow.
- Over 9500 Video sessions in 2021.
- 9 Video Banking employees.
- Alloya processes our check deposits, processing is completed one file (same time as ITMs) at 7:45pm each week day.
  - Separate branch ID, but in the same file as our mobile remote deposits for balancing.
- Marketing for Video Banking but not for Check Deposits specifically.
- Recent updates have allowed for cropping the front and back check images, and also a pre-pic disclosure.

The Feedback.

7	7	7	10	I like cashing checks this way	Kathryn Dailey	Zac B	4/7/2021
7	7	7	10	I have no complaints. The video call was very helpful and the teller as well. Very good way to deposit checks when you don't live in the state anymore.	Gissela Tomasello	Shelby T	5/26/2021
7	7	7	10	Person who directed me to video banking was extremely helpful as was my video helper who deposited my check.	Lethario Vanish	Zac B	3/19/2021

Q&A

Customer Success

Kurt Forsberg
VP of Customer Success

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2021 Growth and Results

New Teams Created In January

- Customer Success Managers
- Technical Support

Discussions with your CSM

First Call Resolution

Survey Results

Support Procedures

Support Escalation Procedures

Severity 1 Issues—24/7			
1	Call Support	Technical Support Team	801-417-9000 Option 2
2	Customer Success Manager (CSM)	Varies	Varies
3	VP Customer Success	Kurt Forsberg	801-580-9614
4	President	Jed Taylor	801-505-1241
Severity 2-4 Issues—During Business Hours			
1	Support E-mail JIRA Service Desk		support@popio.com
2	Call Support	Technical Support Team	801-417-9000 Option 2
3	Customer Success Manager (CSM)	Varies	Varies

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Additional Opportunities

Customer Case Studies

- Please notify your CSM

POPi/o Customer Newsletter

- Product Updates
- Links to Videos
- Best Practices

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POPi/o User Group Conference

- **Fall In-Person/Virtual User Group Conference**
  - When: October 6-7
  - Where: Hale Center Theatre, Sandy, Utah
    - We will be completed by 3:00 pm on the 7th
  - What:
    - Opportunity to hear from and learn from your peers.
    - Networking
    - In-depth product discussions

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Thank You!

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