

IMPLEMENTATION:

BRINGING i^3 IDEAS TO YOUR CREDIT UNION



Did you know:

- Since 2005, Filene's i^3 program has developed over 40 innovations specifically for credit unions.
- Several of these ideas are ready for implementation in your credit union.
- Filene can help bring these ideas to life at your credit union so you can start enjoying their rewards.

**Now scheduling
advisory engagements**



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Credit union growth is a perennial challenge. Despite off the charts performance in member service and favorable pricing, credit unions find themselves struggling to grow market share. Through Filene's unique research and innovation efforts we are ready to help your credit union implement innovation solutions in the following member need areas:

- **Building Wealth.**
- **Managing Financial Waters.**
- **Navigating Life's Milestones.**
- **Making Community Connections.**
- **Borrowing Responsibly.**



MATT DAVIS

Matt Davis is an advisor specializing in implementation. The Filene Research Institute has partnered with Matt to present, advise, and complete project work with credit unions based on our i³ ideas and innovative processes.

Prior to this engagement, Matt was a member of the Filene Research Institute's inaugural 30 Under 30 group and author of "The Credit Union Warrior" blog.

Matt has been at the center of credit union innovation since 2004. Projects such as *What are you saving for?* and *Football Pick'em* have earned Matt international recognition, including features in *Fast Company*, *Yahoo! Finance*, *Bankrate.com*, and credit union trade press. He is an accomplished public speaker, frequently presenting to credit union professionals across the country. In February 2009, Matt was named one of the Triad Business Journal's 40 Business Leaders Under 40 (N.C.).

Matt earned a degree in marketing from the College of William & Mary (Williamsburg, VA), and completed Basic Cadet Training at the United States Air Force Academy (Colorado Springs, CO). Matt earned his CUDE designation from the National Credit Union Foundation in 2009.

Three Ways to Engage with Filene:

1 SPEAK

If your meeting needs objective, up-to-the-minute insights about innovation and growth, Filene can customize a presentation to address your specific questions. Available topics include:

- i³ ideas pipeline (see ideas at filene.org/home/innovation).
- Bringing the innovation competency to your credit union.
- Trends in financial services innovations.

2 ADVISE

Do you have a specific i³ idea that you are eager to implement? We will meet with your team, assess the situation, and collaboratively develop an implementation plan that will exceed your needs. Specific concepts ready for implementation include:

- Smart Score
- Life Stage Products
- MatriMoney®
- And more!

3 CUSTOMIZE

Perhaps you prefer to customize a project for your individual credit union placing your innovation and growth strategies and outputs under a microscope in order to improve results.

We will develop a tailored approach that works with your credit union's existing priorities and strategic direction.

» Learn proven techniques. » Apply cutting-edge research. » Bring innovation and growth into focus

Email research@filene.org or call (608) 231-8550 for more information.