



TRUSTONE DIGITAL DASHBOARD

Boomi User Group

March 19th, 2026

Who We Are...



TRUSTONE
FINANCIAL[®]

Second-Largest Credit Union in Minnesota

\$5.9 billion in assets - 215,000 members
540 employees - 24 branches in MN & WI

Mission

We engage, educate and inspire our members to achieve lifelong financial well-being

Business Model



Delivering Value

Relevant components of our Strategic Plan:
Process Improvement & Efficiency
Digital Transformation / Community Impact

ONE CONSOLE



Single Staff Console

A unified console assembles member profiles in real time, eliminating the need for multiple system navigation.



Operational Efficiency Gains

Consolidation addresses inefficiencies like tool switching, manual data entry, and unnecessary escalations.



Outcome Measurement

Success is tracked via faster resolution times, higher first-contact resolution, and fewer transfers.



Governed Servicing Actions

Platform enables over 10 secure servicing features with full auditability and compliance.



OPERATIONAL IMPACT: BEFORE VS. AFTER



PLATFORM OVERVIEW: ONE CONSOLE, SIX SYSTEMS

Central Integration Hub

The Boomi API hub acts as a single integration layer enabling seamless data access and action execution across systems.

Canonical Digital Profile

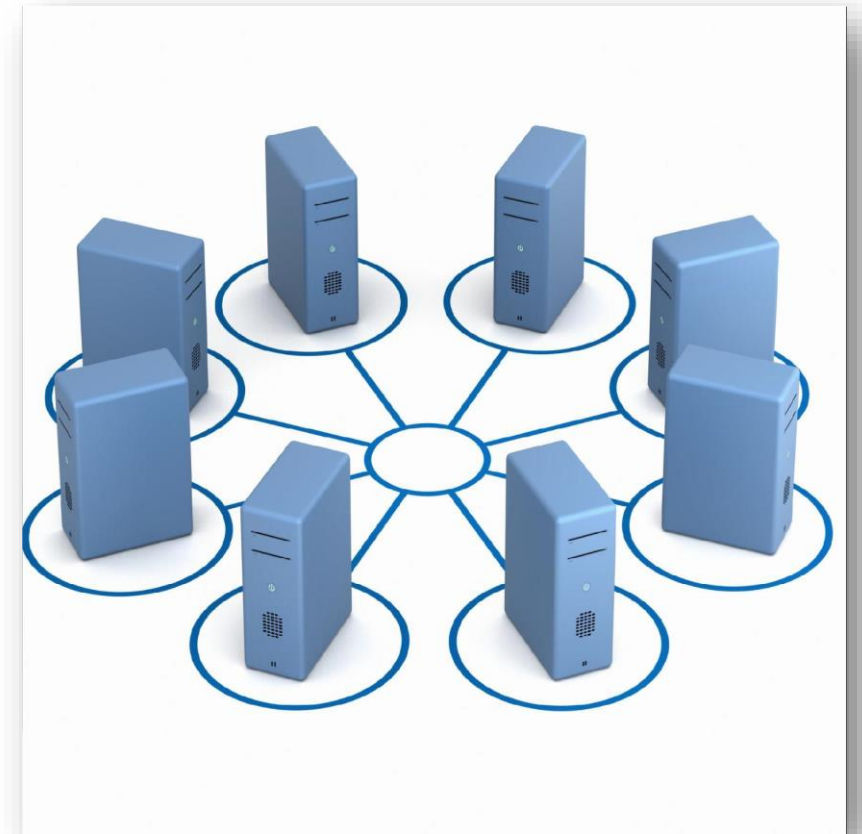
A stable JSON contract composes data from six systems into a unified digital profile reducing complexity and change costs.

Governed Actions and Audit Trails

Governed actions flow through the API layer with logging and audit trails ensuring operational compliance.

Operational Resilience

Orchestration returns the best available data to the console even if some downstream systems are degraded.



OUTCOMES: REUSE, SPEED-TO-CHANGE, AND RISK REDUCTION

- Reuse and Standardization
- Speed and Performance
- Risk Reduction and Reliability
- Security and Compliance



SERVICING ACTION CATALOG: GOVERNED AUTOMATION AT SCALE

- Clear Service Catalog
- Governed API Layer
- Operational Benefits
- Extensible Automation



THANK YOU

