

Now for the tactical presentations...

Data in Action

Tactic #1:

Continue to enhance dashboard toolkits

IMPROVE THE COMPETENCY OF CUS: WHAT THEY ASK AND HOW THEY SEE THE ANSWERS

- ❑ Our standard for CU*BASE dashboards:
 1. Select a group of records with something in common (*loan apps processed in Oct, new members last year, checking accounts opened last month*)
 2. See the list and use various options to work the records, one at a time (*approve the app, send TIS disclosures, order a debit card*)
 3. You are also presented with a set of analyses that show pertinent facts about that group of records (*# of apps still pending, new members by age and gender, checking accounts opened by a specific employee*)
- ❑ Step 1 is like a report, Step 3 is like the totals or summary section on a report, but Step 2 creates a unique palette of opportunity to work and analyze at the same time

Embedded in these dashboards is the ability to **go active**, right now, every time...and all you have to do is plan to do so

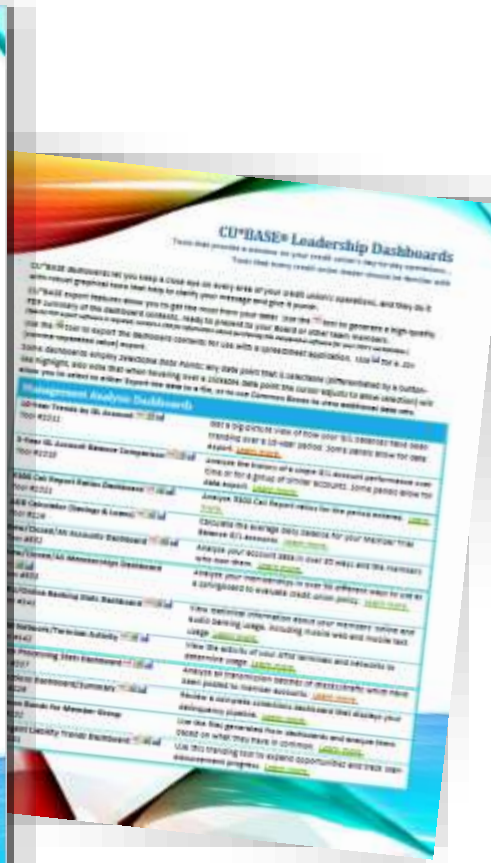
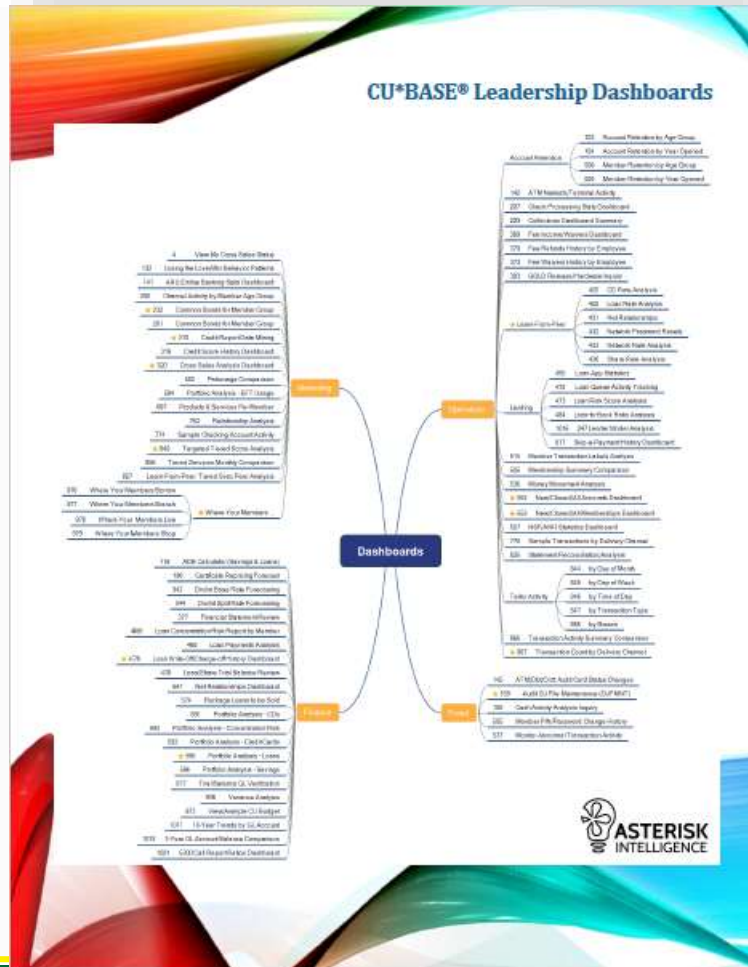
Have you created a communication manager and assigned them regular dashboard activities to ensure a low-cost reach-out to your members?

Is this gaining traction in your shop?

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Session 1 CU*BASE GOLD - Primary Data Sources

Files/Tables	MSHIST	MBRBAL		
Fields/Columns	BRANCH MBRDESG CLOSDT	EOMBAL OCT EOMBAL NOV EOMBAL DEC EOMBAL JAN EOMBAL FEB EOMBAL MAR EOMBAL APR EOMBAL MAY EOMBAL JUN EOMBAL JUL		



CU*BASE users will continue to push us to development more dashboards and improve features inside dashboards for years to come...
But the big move is to think of dashboards as *repeatable analytical approaches*

Tactic #2:

Develop presentations with two audiences in mind

Private / Browser

Web / Browser

Account #	# Accts	Name	Date Opened	Data Center	Gender	Emp ID	Branch	ZIP
19885	2		Jun 28, 2016		M	DI	1	48757
20872	5		Jun 9, 2016		M	RY	23	48736
27015	3		Jun 7, 2016		F	BO	6	48708
30603	3		Feb 16, 2016		M	LD	6	48734
33090	1		7th 3, 2016	Fin 4, 2016	F	ME	1	48734
34037	1		Jul 10, 2016		M	KL	6	48031
			Jun 9, 2016		M	CH	24	48631
			Jun 9, 2016		M	DI	1	48736
			Apr 1, 2016		M	JO	6	48601
			Apr 11, 2016		M	JH	6	48601
			May 20, 2016	Mar 31, 2017	M	JE	4	48031
			Mar 17, 2016		F	JO	6	48605
			Apr 14, 2016	Aug 31, 2016	M	WA	23	49457
			Jan 1, 2016		M	SO	6	48748
			Jul 15, 2016		F	NO	1	48734

FILExx and FILExxE

Ln. Ctg	Description	Current Requested Average Rate	Current Average Rate	Low Rate	High Rate	# Loans (Stat: 46,23)	# Pkgs (Stat: 2,17)	# Miss (Stat: 41,76)	Current Balance (Stat: 198,273,40)
01	REVOLVING LINE OF CREDIT	12.883	13.022	6.800	18.800	388	7	388	276,638
02	RECREATIONAL VEHICLES	6.728	6.791	1.980	18.800	768	76	728	11,286,818
03	BOATS	6.728	6.933	2.780	18.800	120	83	312	6,900,682
04	MOTORCYCLE	6.565	6.265	1.200	18.800	320	24	316	2,740,720
05	OVERDRAFT LOC	11.788	12.100	8.200	18.800				25,488
06	PERSONAL	11.174	12.026	3.240	18.800				1,016
07	AUTO LOAN	4.473	4.981	1.980	18.784				1,681
08	USED AUTO LOAN	2.889	3.889	1.889	2.889				4,416
09	INDIRECT AUTO	6.798	6.798	1.798	18.800				3,823
10	INDIRECT RECREATIONAL VEHICLES	6.941	6.088	3.450	18.800				9,275
11	INDIRECT MOTORCYCLE	6.324	6.094	2.500	18.800				1,027
12	SHARE CO SECURED	6.203	6.183	3.200	8.100				4,000

AB web repository

Private member data

Public or scrubbed member data

Line	Qty	Sorted Amount	Rate	Cr/Int Amount	Principal Balance	Average Rate	Amortized Balance	Comp
10	100	248,811	22,118	216,693	118,113,080	4.414	6,124,112	8,127
11	100	248,811	34,267	214,544	116,088,125	4.428	5,196,558	8,125
12	100	248,811	46,415	202,396	114,299,983	4.465	4,138,476	8,124
13	100	248,811	58,563	190,243	112,348,123	4.444	3,189,438	8,146
14	100	248,811	70,711	178,099	110,486,182	4.488	2,180,908	8,141
15	100	248,811	82,859	165,950	108,602,125	4.474	1,153,264	8,148
16	100	248,811	95,007	153,807	106,702,860	4.464	1,182,031	8,146
17	100	248,811	107,155	141,654	104,788,986	4.434	6,189,238	8,131
18	100	248,811	119,303	129,501	102,861,180	4.440	5,176,318	8,122
19	100	248,811	131,451	117,348	100,913,180	4.488	4,233,938	8,148
20	100	248,811	143,599	105,195	98,945,180	4.478	3,192,348	8,178
21	100	248,811	155,747	93,042	96,967,180	4.425	2,144,318	8,128
22	100	248,811	167,895	80,889	94,979,180	4.412	1,140,841	8,121

CU*BASE gold edition

Web Version

Creating a bridge between CU*BASE users and web users

Tactic #3:

Create excitement around the See-to-Act gap

MATCH THE DIVERSITY OF THE AI APPROACH WITH THE TALENTS OF YOUR CU

- AI has a broad and diverse business plan designed to include as many stakeholders as possible

Looking at data for insight:

- Analytics Booth - cuanswers.com/solutions/asterisk-intelligence/analytics-booth
- Custom Analytics - store.cuanswers.com/product/custom-analytical-request
- Asterisk Intelligence Store - store.cuanswers.com/product-category/asterisk-intelligence

Creating ways to store data for insight:

- Data Warehousing - cuanswers.com/solutions/asterisk-intelligence/data-warehousing

Arming a data management leader or team with tools:

- Unique Data Management - store.cuanswers.com/product/unique-data-management-udm-custom-data-fields
- CU Self-Directed Data Floods - cuanswers.com/resources/kitchen/cu-directed-data-floods

Do your homework to see the value prop here – as a user, and someday as a potential investor