Features and Services Upgrade

Release	Release Audience	Release Date	Publication Date
AB_22.12	All Subscribers	December 11, 2022	November 28, 2022

Exploring the Release with Josh Peacock
Asterisk Intelligence Product Development Manager/Business Development

I'm very happy to announce we've reached some very important milestones for the team and user community. On December 11th, our next Analytics Booth release, we will have completed our goal of redesigning all 12 of our Analytics Booth Dashboards. With this redesign we have:

- Added better reporting capabilities.
- Modernized our look and feel.
- Introduced a new charting tool that strengthens your reporting needs.

In addition to the dashboard improvements, the team has been working hard to flush out some issues we have been experiencing with our Alerts logs of Analytics Booth. So be on the lookout for more reliable daily email alerts coming very soon.

On a different note, we hit another significant benchmark by cresting our 200th Analytics Booth subscription goal in September. This gives us a 60% penetration rate for Analytics Booth subscribers in the network. Although this is impressive, I strongly believe as we continue to make investments on improving our Analytics Booth web-based platform, more credit unions will be incorporating this toolset into their reporting arsenal.

Training and Information Sessions
Join the Asterisk Intelligence team for a web-hosted release review

Wednesday, December 7 *@ 3:00 – 4:00 PM ET*
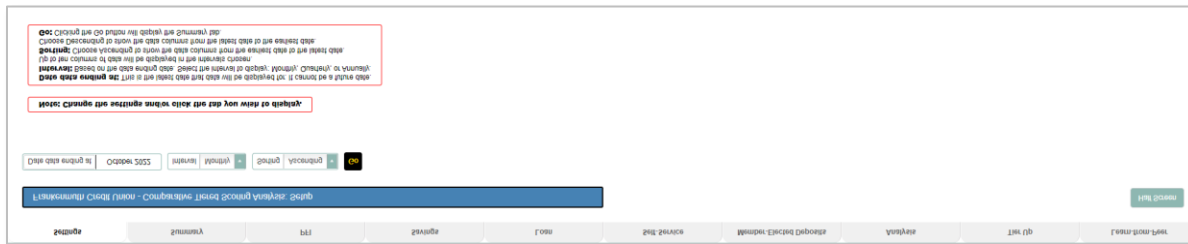## Thursday, December 15 *@ 3:00 – 4:00 PM ET*

Tiered Services Comparison Dashboard Upgrades

Check out the highlights of the Tiered Services Comparison dashboard in this exciting reveal!

New "Data First" Model, Featuring Charts on Top!

Changes to this dashboard design can be seen directly upon entry. While previously you entered a screen to set up your filters, the new design takes you directly to the dashboard, with the charting on top and the supporting data below.
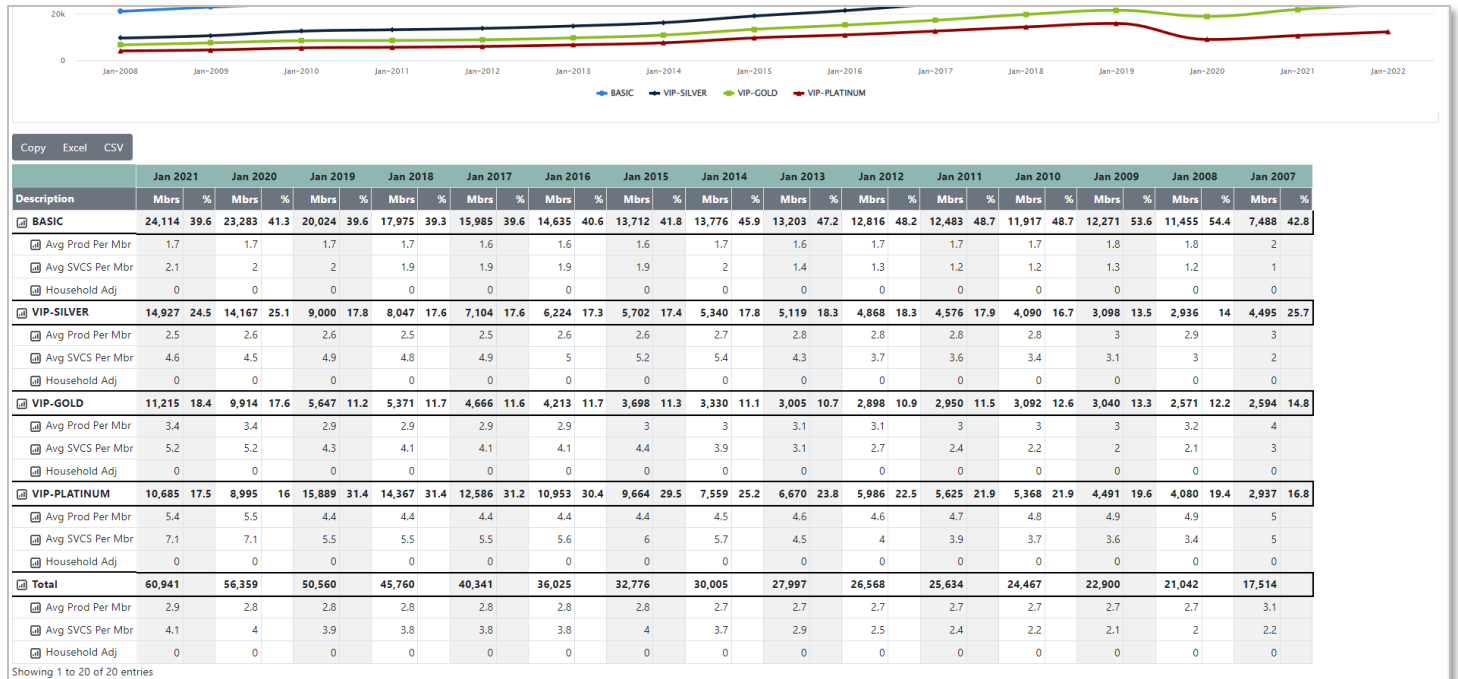
Old Entry – Filter First

New Entry – "Data First" with Charts on Top

Description	Jan 2021		Jan 2020		Jan 2019		Jan 2018		Jan 2017		Jan 2016		Jan 2015		Jan 2014		Jan 2013		Jan 2012		Jan 2011		Jan 2010		Jan 2009		Jan 2008		Jan 2007	
	Mbrs	%	Mbrs	%	Mbrs	%	Mbrs	%	Mbrs	%	Mbrs	%	Mbrs	%	Mbrs	%	Mbrs	%	Mbrs	%	Mbrs	%	Mbrs	%	Mbrs	%	Mbrs	%	Mbrs	%
BASIC	24,114	39.6	23,283	41.3	20,024	39.6	17,975	39.3	15,985	39.6	14,635	40.6	13,712	41.8	13,776	45.9	13,203	47.2	12,816	48.2	12,483	48.7	11,917	48.7	12,271	53.6	11,455	54.4	7,488	42.8
Avg Prod Per Mbr	1.7		1.7		1.7		1.7		1.6		1.6		1.6		1.7		1.6		1.7		1.7		1.7		1.8		1.8		2	
Avg SVCS Per Mbr	2.1		2		2		1.9		1.9		1.9		1.9		2		1.4		1.3		1.2		1.2		1.3		1.2		1	
Household Adj	0		0		0		0		0		0		0		0		0		0		0		0		0		0		0	
VIP-SILVER	14,927	24.5	14,167	25.1	9,000	17.8	8,047	17.6	7,104	17.6	6,224	17.3	5,702	17.4	5,340	17.8	5,119	18.3	4,868	18.3	4,576	17.9	4,090	16.7	3,098	13.5	2,936	14	4,495	25.7
Avg Prod Per Mbr	2.5		2.6		2.6		2.5		2.5		2.6		2.6		2.7		2.8		2.8		2.8		2.8		3		2.9		3	
Avg SVCS Per Mbr	4.6		4.5		4.9		4.8		4.9		5		5.2		5.4		4.3		3.7		3.6		3.4		3.1		3		2	

Below the Charts is Complete Data that Can be Exported for Analysis

Yes, there is complete data below the charts!

`Copy` `Excel` `CSV`

Description	Jan 2021 Mbrs	%	Jan 2020 Mbrs	%	Jan 2019 Mbrs	%	Jan 2018 Mbrs	%	Jan 2017 Mbrs	%	Jan 2016 Mbrs	%	Jan 2015 Mbrs	%	Jan 2014 Mbrs	%	Jan 2013 Mbrs	%	Jan 2012 Mbrs	%	Jan 2011 Mbrs	%	Jan 2010 Mbrs	%	Jan 2009 Mbrs	%	Jan 2008 Mbrs	%	Jan 2007 Mbrs	%
BASIC	24,114	39.6	23,283	41.3	20,024	39.6	17,975	39.3	15,985	39.6	14,635	40.6	13,712	41.8	13,776	45.9	13,203	47.2	12,816	48.2	12,483	48.7	11,917	48.7	12,271	53.6	11,455	54.4	7,488	42.8
Avg Prod Per Mbr	1.7		1.7		1.7		1.7		1.6		1.6		1.6		1.7		1.6		1.7		1.7		1.7		1.8		1.8		2	
Avg SVCS Per Mbr	2.1		2		2		1.9		1.9		1.9		1.9		2		1.4		1.3		1.2		1.2		1.3		1.2		1	
Household Adj	0		0		0		0		0		0		0		0		0		0		0		0		0		0		0	
VIP-SILVER	14,927	24.5	14,167	25.1	9,000	17.8	8,047	17.6	7,104	17.6	6,224	17.3	5,702	17.4	5,340	17.8	5,119	18.3	4,868	18.3	4,576	17.9	4,090	16.7	3,098	13.5	2,936	14	4,495	25.7
Avg Prod Per Mbr	2.5		2.6		2.6		2.5		2.5		2.6		2.6		2.7		2.8		2.8		2.8		2.8		3		2.9		3	
Avg SVCS Per Mbr	4.6		4.5		4.9		4.8		4.9		5		5.2		5.4		4.3		3.7		3.6		3.4		3.1		3		2	
Household Adj	0		0		0		0		0		0		0		0		0		0		0		0		0		0		0	
VIP-GOLD	11,215	18.4	9,914	17.6	5,647	11.2	5,371	11.7	4,666	11.6	4,213	11.7	3,698	11.3	3,330	11.1	3,005	10.7	2,898	10.9	2,950	11.5	3,092	12.6	3,040	13.3	2,571	12.2	2,594	14.8
Avg Prod Per Mbr	3.4		3.4		2.9		2.9		2.9		2.9		3		3		3.1		3.1		3		3		3		3.2		4	
Avg SVCS Per Mbr	5.2		5.2		4.3		4.1		4.1		4.1		4.4		3.9		3.1		2.7		2.4		2.2		2		2.1		3	
Household Adj	0		0		0		0		0		0		0		0		0		0		0		0		0		0		0	
VIP-PLATINUM	10,685	17.5	8,995	16	15,889	31.4	14,367	31.4	12,586	31.2	10,953	30.4	9,664	29.5	7,559	25.2	6,670	23.8	5,986	22.5	5,625	21.9	5,368	21.9	4,491	19.6	4,080	19.4	2,937	16.8
Avg Prod Per Mbr	5.4		5.5		4.4		4.4		4.4		4.4		4.4		4.5		4.6		4.6		4.7		4.8		4.9		4.9		5	
Avg SVCS Per Mbr	7.1		7.1		5.5		5.5		5.5		5.6		6		5.7		4.5		4		3.9		3.7		3.6		3.4		5	
Household Adj	0		0		0		0		0		0		0		0		0		0		0		0		0		0		0	
Total	60,941		56,359		50,560		45,760		40,341		36,025		32,776		30,005		27,997		26,568		25,634		24,467		22,900		21,042		17,514	
Avg Prod Per Mbr	2.9		2.8		2.8		2.8		2.8		2.8		2.8		2.7		2.7		2.7		2.7		2.7		2.7		2.7		3.1	
Avg SVCS Per Mbr	4.1		4		3.9		3.8		3.8		3.8		4		3.7		2.9		2.5		2.4		2.2		2.1		2		2.2	
Household Adj	0		0		0		0		0		0		0		0		0		0		0		0		0		0		0	

Showing 1 to 20 of 20 entries

Sticky Filters – Like the Settings in Your Car: Set them and Forget Them!

Want to view the first month of the year over several years or some other filter pattern? The filter page is now easily accessed via the **Set Preferences button** on the main data view. From there whatever filters you set will be the default each subsequent time you enter the dashboard. They are sticky filters, which means that they remain not only for the current session but for every subsequent time you enter the dashboard. Just like your car, you can set them the way you like them and leave them!

Want to change your filters? Not a problem. Simply select the **Set Preferences button** to set new filters. Select month, three-month, or year intervals for periods of five, ten, or fifteen.
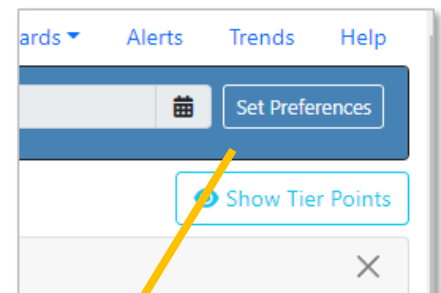
New Filtering Window

# Display Your Data in New Ways – Even Demo Live in Your Board Meeting

Showing data in new ways is always sure to be a crowd pleaser and bring new interest to existing data. The Member Ratios Over Time and Tiered Point Balance Ratios charts are shown in new interactive bar charts.

New Bar Charts Provide a Fresh Look at Data
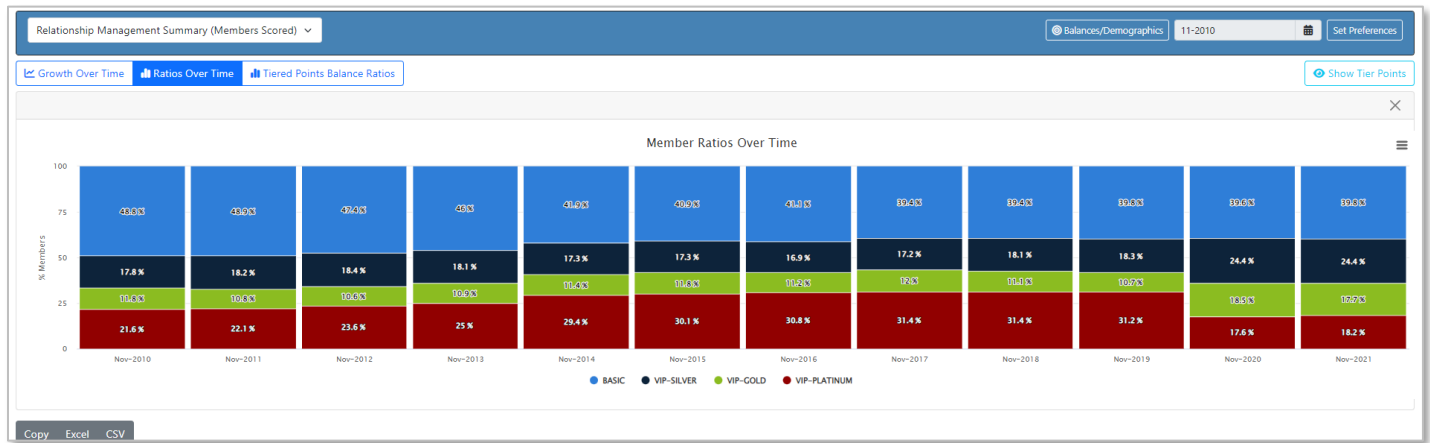
Interactive Charting – Great to See Specific Data Points (or for Demo)

As the mouse moves over the chart, only one segment is highlighted at a time. *So exciting, you may decide to demo the software live at your next Board Meeting.* (Of course, if you want to paste in your Board Report or copy in your clipboard, that is always an option.)
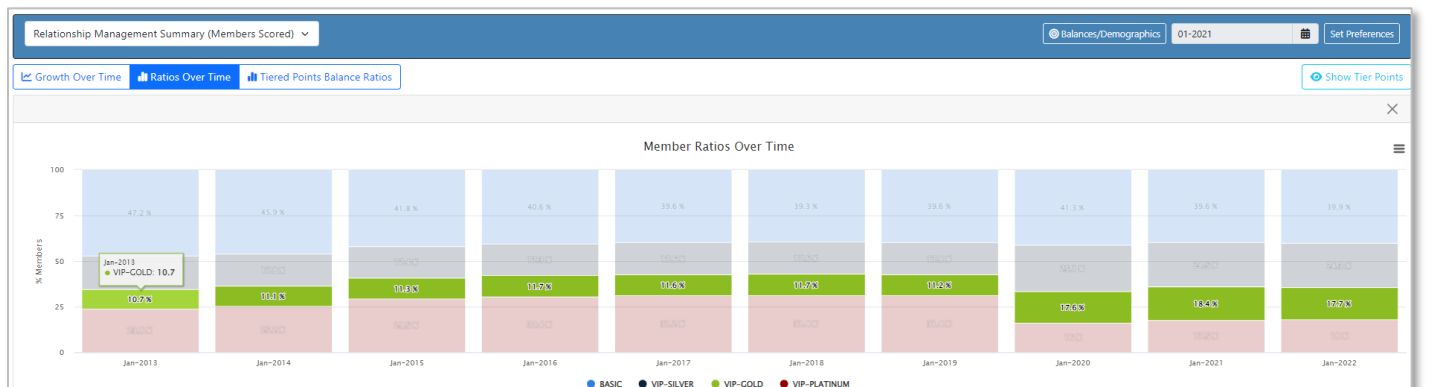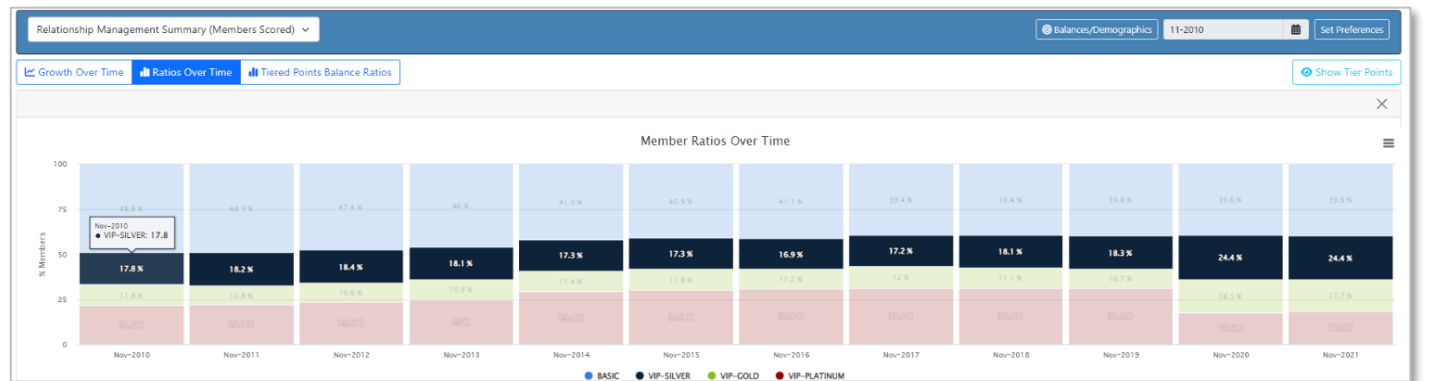
More Charts than You Can Count – With a Big Focus on VAT

Graphs and charts can drastically increase the absorption of your data, and this release delivers! We did try to make an estimate and there are at least **300 new data points**, diving down to the individual goal item. Charts and graphs galore. We hope you will be able to extract some additional value from this new information

Below is the Member Data for the Text Banking Tiered Service goal in the Self Service Category, with both bar and pie charts presented. (There are three to four new charts and graph categories at this sub-point level.)

Penetration Analysis: Self Service Goals Balances/Demographics –Text Banking Enrolled
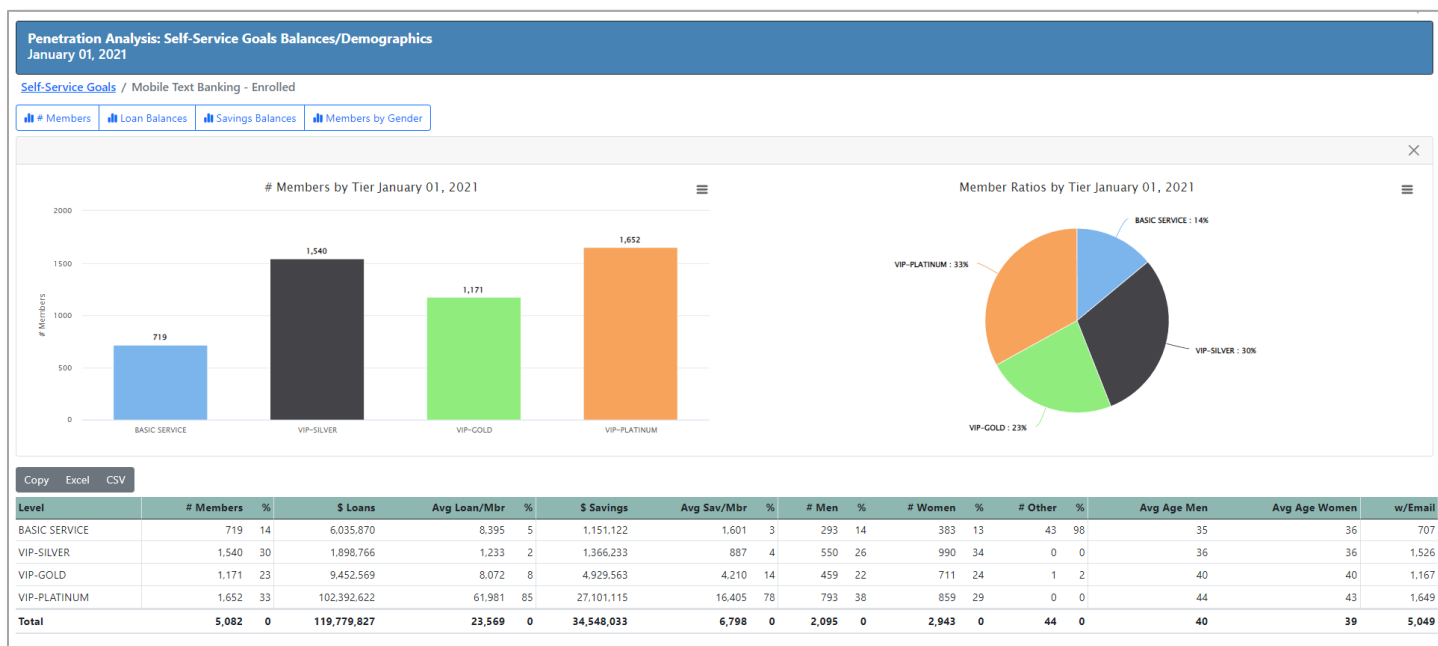
Check out how you can view both member numbers (left) and percentages (right) at the same time!

Exciting Web Interface Access at the Sub-Goal Level with Export Options

We know how important it is to be able to export the data on these dashboards and so we've added the download features throughout them. And always remember with a right click on a chart, you can save it to your clipboard to paste in your marketing materials and Board Reports. Check out some samples below.

Modern Web Interface to Access Goals

Download Options at the Sub-Goal Level
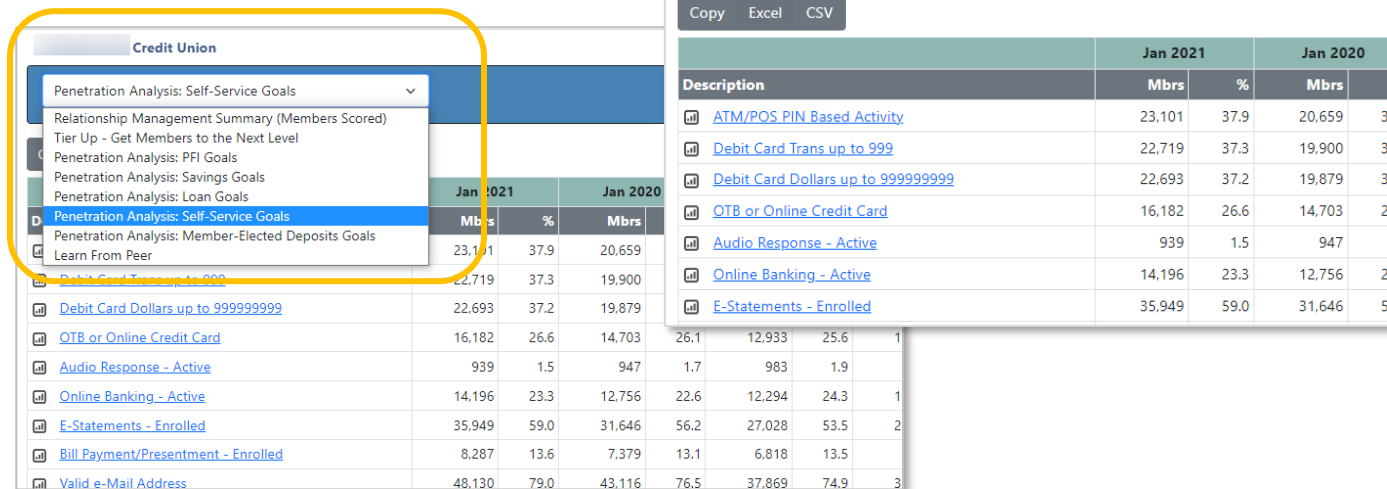
Learn From a Peer Got a Big Makeover

We encourage you to attend the release training to get the full extent of the upgrade of the Learn From a Peer dashboard area in the Tiered Services dashboard. This powerful resource allows you to compare your Tiered Service program with other credit unions' programs in the network. Below we show the comparison of one credit union with another at the sub-goal level.

Compare Your Point Structure with Another Credit Union of Similar Asset or Membership Size

Community CU

Learn From Peer ▾

Learn From Peer / Settings ▾

Configured Tiered Service Levels

Credit Union	Basic	Level A	Level B
Community CU	From 0 to Level A	From 150 To 299	From 300 To 499
Credit Union	From 0 to Level A	From 100 To 199	From 200 To 299

Tiered Service Level Scoring

Goal 1 : Primary Financial Institution Relationships (PFI)

Goal 2 : Analyzing Member Savings Relationships

Goal 3 : Analyzing Member Loan Relationships

Goal 4 : Analyzing Member Self-Serve Product Relationships
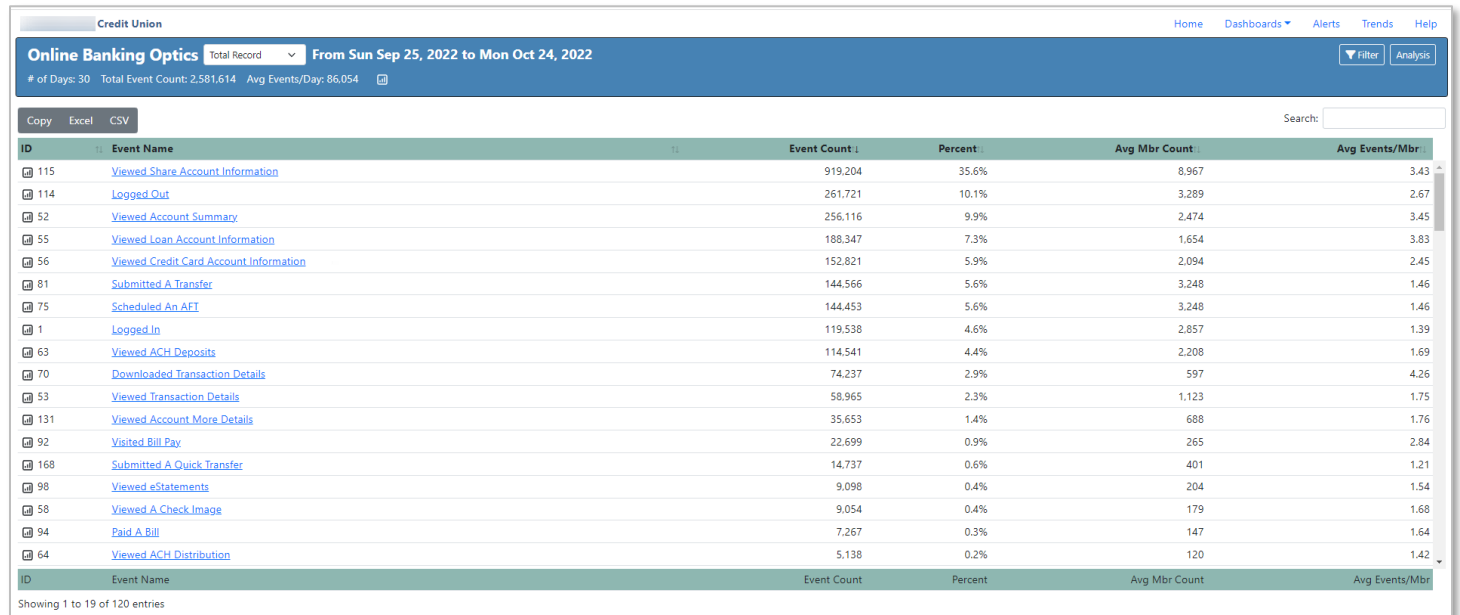
Alpena Community CU		Frankenmuth Credit Union	
Points	**Description**	**Points**	**Description**
25	ATM/POS PIN Based Activity	10	ATM/POS PIN Based Activity
125	Debit Card Trans up to 15	0	Debit Card Trans up to 999
250	Debit Card Trans 16 to 30	0	Debit Card Trans to
375	Debit Card Trans 31 to 45	0	Debit Card Trans to
500	Debit Card Trans 46 to 999	0	Debit Card Trans to
0	Debit Card Dollars up to 999999999	0	Debit Card Dollars up to 999999999
0	Debit Card Dollars to	0	Debit Card Dollars to
0	Debit Card Dollars to	0	Debit Card Dollars to
0	Debit Card Dollars to	0	Debit Card Dollars to
100	OTB or Online Credit Card	20	OTB or Online Credit Card

Online Banking Optics Dashboard Upgrades

Check out the highlights of the Online Banking Optics dashboard below.

Now Defaults to a Filter for a Month-Long View

Upon entry, you will now view an entire month of online banking optics data.

More Easily Group Like Statistics Together

With the updated filter and new Search, you can now group like events together (such as views to your rate board.)

Find Totals for Event Groups on the Detail Screen

Don't miss monthly metrics to establish patterns and dive into your analytics!

It's easy to find how many views you have on your rate board for the month. Just click Filter on the screen shown previously to move to the detail view. Since we've filtered to show activity on all rate boards, the total views that appears at the top of the page as the "Total Event Count" is the number of visits your member has made in online banking to check out your competitive rates!
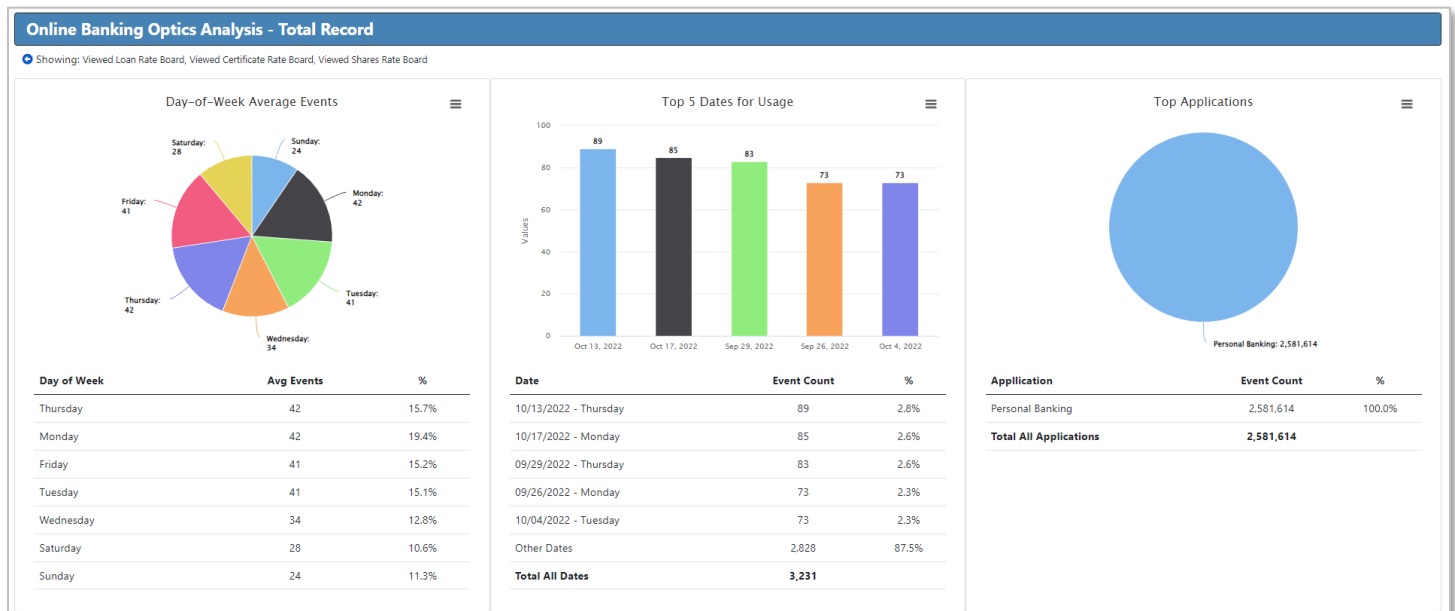
Three Charts are Better Than One!

There are so many ways to analyze your data in colorful charts and graphs. You can click and copy, but why not demo live?

Online Banking Optics Analysis - Total Record

Showing: Viewed Loan Rate Board, Viewed Certificate Rate Board, Viewed Shares Rate Board

Day-of-Week Average Events

Day of Week	Avg Events	%
Thursday	42	15.7%
Monday	42	19.4%
Friday	41	15.2%
Tuesday	41	15.1%
Wednesday	34	12.8%
Saturday	28	10.6%
Sunday	24	11.3%

Top 5 Dates for Usage

Date	Event Count	%
10/13/2022 - Thursday	89	2.8%
10/17/2022 - Monday	85	2.6%
09/29/2022 - Thursday	83	2.6%
09/26/2022 - Monday	73	2.3%
10/04/2022 - Tuesday	73	2.3%
Other Dates	2,828	87.5%
Total All Dates	**3,231**	

Top Applications

Application	Event Count	%
Personal Banking	2,581,614	100.0%
Total All Applications	**2,581,614**	

And they are interactive too.

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| Application	Event Count	%
Personal Banking	2,581,614	100.0%
Total All Applications	**2,581,614**	

Copy and Export Your Online Banking Optics Data for Further Analysis

As shown on the previous detail screen you can export and copy the data.

On the charts page, we take that one step further with a full feature list of exports including PNG, JPEG, SVG vector, and an option that make your chart into a PDF document.
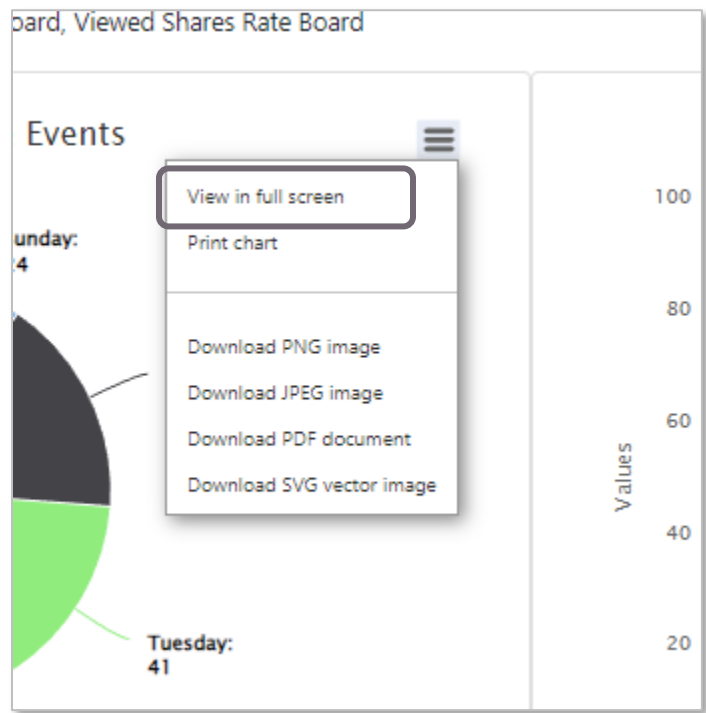

If you are doing a live demonstration, you can even elect to expand your chart to fill your entire screen.
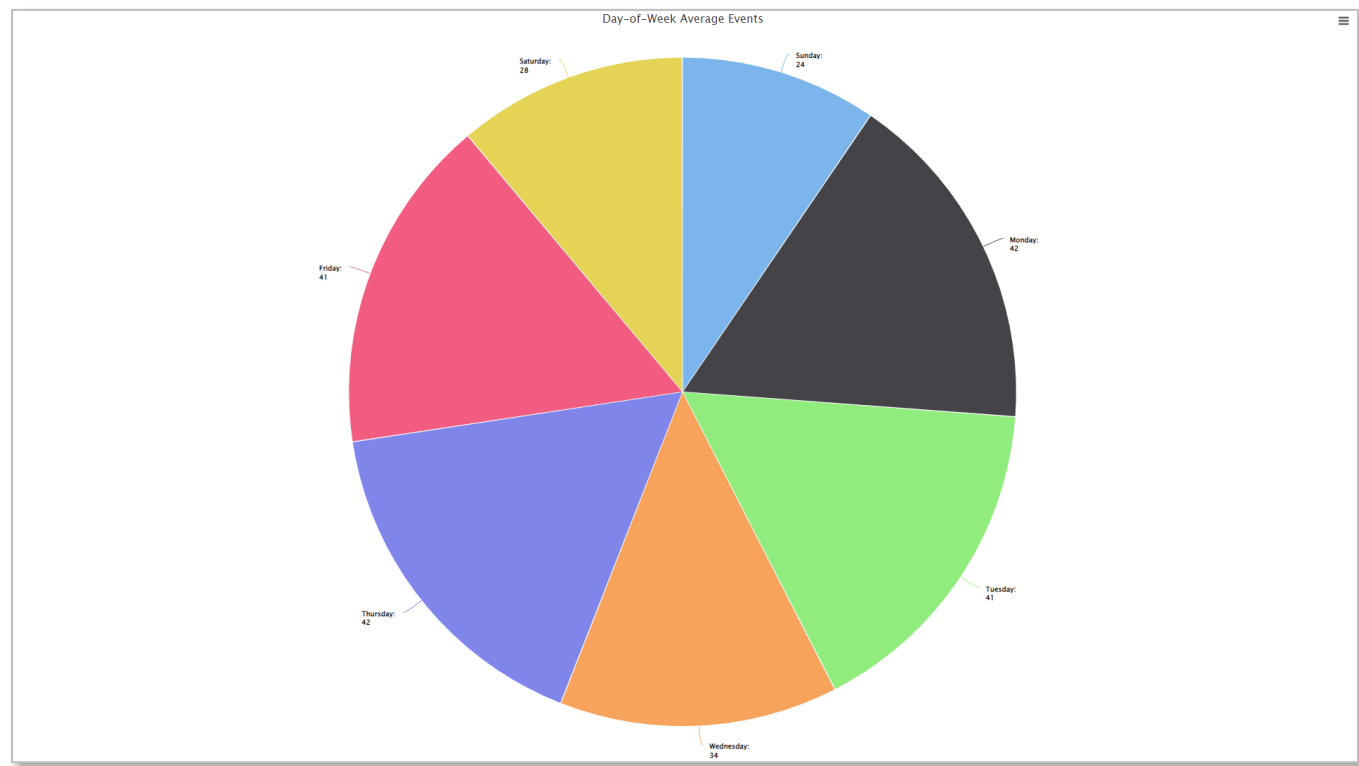
Slice Your Optics Data and Narrow Your View to a Single Day

And if you just want to view activity for one day, it is easy to change your date range to fit that metric. Establish the effectiveness of your online banking promotions down to the launch day. Review activity for just the weekend as opposed to weekdays. The number of ways you can slice and dice your data is limited only to your imagination.
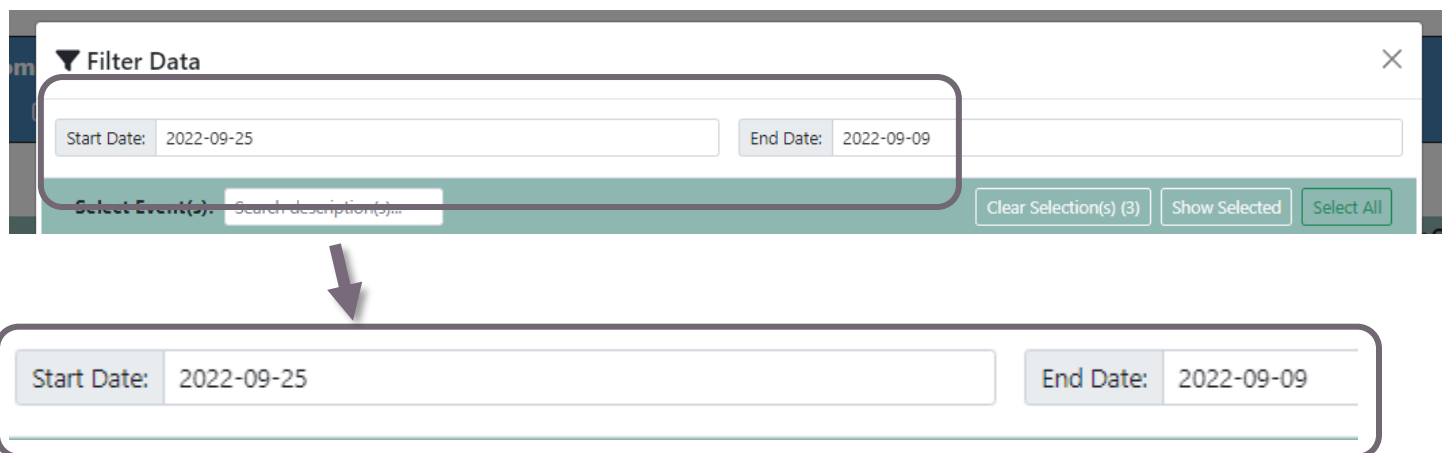
Finalized Updates to All Twelve Dashboards

Finally, we've finalized our upgrades to all twelve dashboards with the new dashboard standards that we introduced in the previous releases. With this release we've included a performance boost, a modern interface, exciting new chart features, and additional filtering to the Tiered Services and Online Banking Dashboards.

Performance Boost

With this release, the two dashboards have decreased load times for quicker data on the go.

Interactive Data Table Interface

The new standard charting that we are applying throughout the dashboards comes with a sleek interface; each column is sortable using the up/down sort indicators in the column headers. We've reordered the columns to follow the logical sense with the math, putting the most frequently analyzed columns first. With this new charting option, achieving a graph becomes a one-click process by simply selecting the graphing icon from the code column.

More Points of Data Plus More Visual Charting in Graphing Updates

More points of data are now easily visible and accessible in the chart with a hover or a click. The graphs are also more complete, featuring a header and footer to distinguish the graph – even better for direct insertion in your board packet! Included in the graphing package is the ability to select an additional data point to add to the graph. We recommend using the filter options to select the codes that you would like to view, then using the Additional Data Point drop-down to select an additional line of data for the graph.

Updated Filtering Selection and Display

The filtering capabilities have received a major upgrade in this release. When selecting the Filter button at the top of the dashboard, a pop-up screen will appear, allowing users the ability to search for selected GLs, use multi-select to choose multiple criteria, or select all/clear all choices. Additionally, you can view only the selected filters by using the Show Selected option in the filter screen.

Updated Filter and Header Selection Area

As introduced in the last release, the heading area of each graph is more aesthetic and succinct. Additionally, the Filter now allows for multi-select, allowing users to select multiple codes or categories. This new ability allows subtotaling selected groups of items. When filtering, selections will be shown in the top section of the dashboard. To view, hover over the link to see the selected groups or GLs.