CU*BASE® Leadership Dashboards

Tools that provide a window on your credit union's day-to-day operations...
Tools that every credit union leader should be familiar with

CU*BASE dashboards let you keep a close eye on every area of your credit union's operations, and they do it with robust graphical tools that help to clarify your message and give it punch. Several dashboards include Visual Analytics Tools (VAT) that include will help with the addition of charts and graphs to allow you to more easily explain the data on the screen.

CU*Answers and CU*BASE will have the most extensive and comprehensive Visual Analytical Tools on the market today – more points made through visuals that grab the audience and make the consumer's grasp of information undeniable. Our hope? This suite of visual analytical tools will help all data analysts grab some attention – you need presentation graphics that catch an audience's eye and communicate information without distraction. Learn more.

CU*BASE export features allow you to get the most from your data! Use the 📄 tool to generate a high-quality PDF summary of the dashboard contents including charts and graphs, including Virtual Analytics Tools (VAT), ready to present to your Board or other team members.

(Special PDF export software is required; contact a CSR for information about purchasing this inexpensive software for your CEO's workstation.)

Use the 🔲 tool to export the dashboard contents for use with a spreadsheet application. Use 💾 for a .csv (comma-separated value) export.

Management Analysis Dashboards

10-Year Trends by GL Account *Tool #1010*	Get a big-picture view of how your G/L balances have been trending over a 10-year period. Learn more.
3-Year GL Account Balance Comparison *Tool #1018*	Analyze the history of a single G/L account performance over time or for a group of similar accounts. Learn more.
5300 Call Report Ratios Dashboard 📄🔲💾 *Tool #1021*	Analyze 5300 Call Report ratios for the period entered. Learn more.
Activity Validation Dashboard *Tool #1220*	Use to look for any sizable issues or "out of whack" numbers and to be curious about the context around your financial data. Learn more.
ADB Calculator (Savings & Loans) 📄🔲💾 *Tool #116*	Calculate the average daily balance for your Member Trial Balance G/L accounts. Learn more.
New/Closed/All Accounts Dashboard 📄🔲💾 *Tool #552*	Analyze your account data in over 35 ways and the members who own them. Learn more.
New/Closed/All Memberships Dashboard 📄🔲💾 *Tool #553*	Analyze your memberships in over 50 different ways to use as a springboard to evaluate credit union policy. Learn more.
ARU/Online Banking Stats Dashboard 📄🔲💾 *Tool #141*	View statistical information about your members' online and audio banking usage, including mobile web and mobile text usage. Learn more.
ATM Network/Terminal Activity 📄🔲💾 *Tool #142*	View the activity of your ATM terminals and networks to determine usage. Learn more.
Check Processing Stats Dashboard 📄🔲💾 *Tool #207*	Analyze all transmission batches of checks/drafts which have been posted to member accounts. Learn more.
Collections Dashboard/Summary 📄🔲💾 *Tool #229*	Review a complete collections dashboard that displays your delinquency pipeline. Learn more.

Management Analysis Dashboards (continued)

Common Bonds for Member Group *Tool #232*	Use the files generated from dashboards and analyze them based on what they have in common. Learn more.
Contingent Liability Trends Dashboard [PDF] [XLS] [Save] *Tool #281*	Use this trending tool to expand opportunities and track loan-disbursement progress. Learn more.
Credit Report Data Mining *Tool #318*	Analyze your members' credit score data (by all credit scores and most recent score). Learn more.
Credit Score History Dashboard [PDF] [XLS] [Save] *Tool #319*	Use this to create a segment of members to contact based on credit score history and to analyze all members to see what percentage of scores are improving, worsening, and more. Learn more.
Cross Sales Analysis Dashboard [PDF] [XLS] [Save] *Tool #320*	Use this dashboard to monitor Cross Sales and follow ups by employee, branch, group, or type, as well as track incentives. Learn more.
Fee Income/Waivers Dashboard [PDF] [XLS] [Save] *Tool #369*	Analyze your month-to-month member service fee income and frequency of your opportunities to earn. Learn more.
Fee Refunds History by Employee *Tool #370*	Review and evaluate which employees are waiving the most fees and for whom they're performing the waivers. Learn more.
Fee Waivers History by Employee *Tool #372*	Review and evaluate which employees are refunding the most fees and for whom they're performing the refunds. Learn more.
Financial Statement Review *Tool #377*	This feature is ideal for employees who simply need to view the results of financial statements already run. Learn more.
Loan Write-off/Charge-off History Dashbd *Tool #476*	Analyze data collected when a loan is written off or charged off. Learn more.
Loan App Statistics Inquiry [PDF] [XLS] [Save] *Tool #455*	View how many and what type of loan applications you processed through the year or during a specific time period. Learn more.
Loan Concentration Risk Report by Member *Tool #460*	Find your top borrowers and analyze concentration risk one member at a time. Learn more.
Loan Queue Activity Tracking [PDF] [XLS] [Save] *Tool #472*	Get a team-wide awareness of your lending goals and how fast you are moving toward them. Learn more.
Loan Payments Analysis [PDF] [XLS] [Save] *Tool #468*	Compare payments received versus those anticipated to analyze how loan payments are flowing through the system. Learn more.
Loan Risk Score Analysis [PDF] [XLS] [Save] *Tool #473*	Compare the performance of your risk-based pricing with your loan performance. Learn more.
Loan Productivity Dashboard *Tool # 1670*	Know which employee worked on the loan, to the level of interviewer, approver, collector, and loan closer, making it easy to work monthly commissions. Learn more.
Loan/Share Trial Balance Review [PDF] [XLS] [Save] *Tool #478*	Analyze the Member Trial Balance for key components including product applications and loan-to-share ratios. Learn more.

Management Analysis Dashboards (continued)

Look-to-Book Ratio Analysis *Tool #484*	Analyze the amount of time it takes for a loan application to be processed. Learn more.
Losing the Love/Member Patterns	Analyze your closed members to find patterns to alert you that current members may be leaving. Learn more.
Membership Summary Comparison PDF ☒ 💾 *Tool #525*	Graphically compare membership data for two months. Learn more.
Net Relationships Dashboard *Tool #547*	Analyze your entire membership (or a segment of it) to see how many net savers and net borrowers there are. Learn more.
NSF Statistics Dashboard PDF ☒ 💾 *Tool #557*	View a full picture of the NSF and Courtesy Pay income credit union wide for an entire year. Learn more.
Patronage Comparison PDF ☒ 💾 *Tool #582*	Use this to compare two segments of your membership to see how they measure up to each other with respect to their activity and patronage. Learn more.
Package Loans to be Sold *Tool #574*	Use this when you sell a portion of your loan portfolio or to segment a portion of your loan portfolio for concentration risk analysis. Learn more.
Payveris Subscribers Dashboard *Tool #1106*	Use this to see where payments are being sent by a group and how much they are paying, as well as a membership financial profile. Learn more.
Reg D/Trans Handling & Analysis Rules PDF ☒ 💾 *Tool #751*	Use this to view four dashboards: an analysis of transaction cost/weigh factors, a transaction reversal cross-reference, and two analyses by your Reg D transaction policy. Learn more.
Skip-a-Payment History Dashboard *Tool #817*	Analyze your consumer skip-payment programs to determine their effectiveness. Learn more.
Targeted Tiered Score Analysis PDF ☒ 💾 *Tool #840*	View a side-by-side comparison of how a selected group of members score in Tiered Services versus your general membership. (Includes filters for your employees/insiders!) Learn more.
Tiered Service Monthly Comparison PDF ☒ 💾 *Tool #856*	View Tiered Service scores side-by-side from multiple months to track your program and how it is motivating members toward higher participation. Learn more.
Transaction Activity Summary Comparison PDF ☒ 💾 *Tool #866*	Use this to assist you in developing your transaction ranges for abnormal transaction activity. Learn more.

Portfolio Analysis Tools

Portfolio Analysis – CDs *Tool #591*	View a snapshot of your entire certificate portfolio to get a picture of your rates across member certificates. Learn more.
Portfolio Analysis – Loans *Tool #595*	View a snapshot of your entire loan portfolio to get a picture of your rates across all loans. Learn more.
Portfolio Analysis – Savings *Tool #596*	View a quick a snapshot of your entire savings portfolio, including shares and IRAs, checking, and escrow savings. Learn more.

Portfolio Analysis Tools (continued)

Portfolio Analysis - Concentration Risk PDF ☒ 💾 *Tool #592*	Analyze risk across your entire loan portfolio – Do you have the right number of eggs, in the right baskets? Learn more.
Portfolio Analysis - Credit Cards PDF ☒ 💾 *Tool #593*	Analyze your credit card plastics portfolio by loan category, BIN, rates, transactions, and balances. Any loan with process type "V" can be included in this analysis. Learn more.
Portfolio Analysis - EFT Usage PDF ☒ 💾 *Tool #594*	Analyze your credit card data for active and inactive credit cards. Then drill down further to see trends for selected members. Learn more.

"Knowing Your Member" Analysis Tools

Channel Activity by Member Age Group PDF ☒ 💾 *Tool #200*	Segment members by age group; then analyze up to five key areas where these members are interacting with your credit union delivery channels. Learn more.
Transaction Count by Delivery Channel PDF ☒ 💾 *Tool #867*	Analyze transactions posted during a selected month to view the most significant origins or delivery channels. Learn more.
Transaction Activity by Branch PDF ☒ 💾 *Tool #865*	View a snapshot of transaction activity between your branches to see activity for specific transaction origins. Learn more.
Member Transaction Labels Analysis PDF ☒ 💾 *Tool #515*	View an aggregate listing of all transaction labels for your entire membership to see how the majority of your members interact with the credit union. Learn more.
Where Your Members Borrow PDF ☒ 💾 *Tool #976*	Rank competitor financial institutions that are also doing business with your members and co-borrowers. Learn more.
Where Your Members Shop *Tool #979*	Analyze by transaction description and retailer name where your members spend their money. Learn more.
Where Your Members Branch *Tool #977*	View shared branching data on your members and on members of other credit unions. Learn more.
Relationship Analysis PDF ☒ 💾 *Tool #752*	View a breakdown of your member and non-member data by age and gender; also view the average age of members at your credit union. Learn more.
Sample Checking Account Activity *Tool #774*	View transaction history for members who had checking account activity for the previous month and analyze this data in 13 different ways. Learn more.
Sample Transactions by Delivery Channel PDF ☒ 💾 *Tool #775*	Analyze members maximizing delivery channels to look for trends/demographics, improve member services, increase revenues, and lower expenses. Learn more.
Where Your Members Live (Member Demographics) PDF ☒ 💾 *Tool #978*	Use this to compare member addresses to locations of credit union branches and ATMs. Learn more.
Money Movement Analysis PDF ☒ 💾 *Tool #536*	Analyze the movement of money from any point in time to another, highlighting the members who need your attention. Learn more.

"Knowing Your Member" Analysis Tools (continued)

Products & Services Per Member PDF XLS 💾 *Tool #697*	View the average PPM and SPM figures from your Tiered Services scoring files to analyze what this means to your credit union. <u>Learn more.</u>
Membership Retention by Age Group PDF XLS 💾 *Tool #508*	View the ages of your members when they joined the credit union, as well retention data of these members. <u>Learn more.</u>
Membership Retention by Year Opened PDF XLS 💾 *Tool #509*	View retention data on memberships by the year the memberships were opened. <u>Learn more.</u>
Account Retention by Age Group PDF XLS 💾 *Tool #103*	View the ages of your members when they opened accounts, as well retention data of these accounts. <u>Learn more.</u>
Account Retention by Year Opened PDF XLS 💾 *Tool #104*	View account retention data by the year the account was opened. <u>Learn more.</u>

Teller & Cash Analysis Tools

Teller Activity by Time of Day PDF XLS 💾 *Tool #846*	View a quick visual of when the bulk of your teller activity occurs during a typical day. <u>Learn more.</u>
Teller Activity by Day of the Week PDF XLS 💾 *Tool #845*	View teller activity by day of week to search for trends and make plans for scheduling. <u>Learn more.</u>
Teller Activity by Day of the Month PDF XLS 💾 *Tool #844*	View transaction counts for each day within the month to see trends, avoid negative situations, and recreate positive ones. <u>Learn more.</u>
Teller Activity by Transaction Type PDF XLS 💾 *Tool #847*	View a breakdown of activities processed by your tellers for a more well-rounded view of your lobby activity. <u>Learn more.</u>
Where Your Members Branch PDF XLS 💾 *Tool #977*	View shared branching data on your members and on members of other credit unions. <u>Learn more.</u>
Cash Activity Analysis Inquiry PDF XLS 💾 *Tool #185*	Verify the activity of cash flowing in and out of branches and the types of checks coming across your counters. <u>Learn more.</u>
Trial Balance GL Verification *Tool #877*	Compare your credit union Member Trial Balance totals to the appropriate General Ledger accounts to see where the two are out of balance. <u>Learn more.</u>
Vault GL Verification *Tool #937*	Compare the Change Fund G/L from the teller system to the general ledger for verification. <u>Learn more.</u>
GL Journal History Inquiry *Tool #60*	View debits and credits for the selected G/Ls (already posted or not posted) beginning with the date entered. <u>Learn more.</u>

"Learn From a Peer" Tools

Fee Comparisons (Several) PDF XLS 💾 *Learn-From-Peer: Bill Pay Service Chrgs (Tool #423)* *Learn-From-Peer: Cashed Check Fee Config (Tool #424)* *Learn-From-Peer: Check Printing Fees (Tool #426)* *Learn-From-Peer: Deposit Item Fees (Tool #427)* *Learn-From-Peer: Money Order Fees (Tool #430)* *Learn-From-Peer: Phone Transfer Fees (Tool #434)* *Learn-From-Peer: Self-Service Fees (Tool #435)* *Learn-From-Peer: Member Starter Checks (Tool #429)*	Compare your credit union fees side-by-side with those of other credit unions. <u>Learn more.</u>

"Learn From a Peer" Tools (continued)

Tiered Services Peer Analysis 📄📊💾 *Tool #857*	Compare statistics of your credit union's Tiered Service Program side-by-side with statistics of other credit unions. Learn more.
Learn-From-Peer: Tiered Services Program 📄📊💾 *Tool #437*	Compare your Tiered Service configuration, including levels and points given, side-by-side with configurations of other credit unions. Learn more.
Learn-From-Peer: CD Rate Analysis 📄📊💾 *Tool #425*	Compare your certificate rates side-by-side with those of other credit unions. Learn more.
Learn-From-Peer: Loan Rate Analysis 📄📊💾 *Tool #428*	Compare your loan rates (credit card and non-credit card) side-by-side with those of other credit unions. Learn more.
Learn-From-Peer: Share Rate Analysis 📄📊💾 *Tool #436*	Compare your savings, IRA, checking, and escrow rates side-by-side with those of other credit unions. Learn more.
Learn-From-Peer: Network Rate Analysis 📄📊💾 *Tool #433*	Analyze your savings, certificate, and loan rates and compare them against the top five credit unions in the network. Learn more.
Learn-From-Peer: Network Password Resets *Tool #432*	Analyze online banking user activity, including password history change data across the network. Learn more.
Learn-From-Peer: Net Relationships *Tool #431*	Compare net savers and net borrowers across the network. Learn more.

Lending Functions Tools

Credit Score History Dashboard 📄📊💾 *Tool #319*	View all credit scores pulled for your membership. Then analyze the scores for a selected Social Security number. Learn more.
Loan Queue Activity Tracking 📄📊💾 *Tool #472*	Get a team-wide awareness of your lending goals and how fast you are moving toward them. Learn more.
Loan App Statistics Inquiry 📄📊💾 *Tool #455*	View how many and what type of loan applications you processed through the year or during a selected time period. Learn more.
247 Lender Model Analysis 📄📊💾 *Tool #1016*	Get a mile-high view of loans as they run through your loan factory and how the 247 Lender Decision Model is being used to approve or deny those loans. Learn more.

Marketing Functions Tools

Household Database Maintenance / Stats (Member Household Statistics) 📄📊💾 *Tool #394*	View several dashboards that provide detailed statistics about a single household member. Access the exports on the analysis showing account balances, number of accounts, and average balance for that member. Learn more.
Household Database Maintenance / Stats (Combined Household Statistics) 📄📊💾 *Tool #394*	View several dashboards that provide detailed statistics about the members of an entire household. Access the exports the analysis showing account balances, number of accounts, and average balance for that household. Learn more.

Marketing Functions Tools (continued)

Membership Summary Comparison PDF 📊 💾 *Tool #525*	View key statistics on your membership, from a breakdown on individual versus organization memberships to an analysis of membership ages. Learn more.
Tiered Service Monthly Comparison PDF 📊 💾 *Tool #856*	View Tiered Service scores side-by-side from multiple months to track your program and how it is motivating members toward higher participation. Learn more.

Back Office Tools

GOLD Release/Hardware Inquiry PDF 📊 💾 *Tool #393*	View hardware and software statistics of your workstations including their operating system, processing speed, and available memory. Learn more.
Smart Operator: Daily Ops Log *Tool #822*	View a record of electronic activity that is posted daily to your member accounts to verify this critical activity is being handled as expected every day. Learn more.

Learn more about these and other CU*BASE tools:

http://www.cuanswers.com/resources/doc/cubase-reference/

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CU*BASE® Leadership Dashboards

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ANALYTICS BOOTH

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