

Tiered Services Enhancements

Coming in the 16.10 release!



Session 6 CU*BASE GOLD Edition - CU*ANSWERS TEST CREDIT UNION

Tiered Service Level Scoring VIEW ONLY

Goal 4: Analyzing Member Self-Service Product Relationships

Points	Description		
25	ATM/POS PIN-based activity		
	# of debit card transactions up to	15	<input checked="" type="checkbox"/> Include PIN-based point-of-sale transactions
10	# of debit card transactions from	16 to 20	
20	# of debit card transactions from	21 to 25	
30	# of debit card transactions from	26 to 999	
	Dollar amount of debit card trans up to	1,000	<input type="checkbox"/> Include PIN-based point-of-sale transactions
10	Dollar amount of debit card trans from	1,001 to 1,500	
20	Dollar amount of debit card trans from	1,501 to 2,000	
30	Dollar amount of debit card trans from	2,001 to 999,999,999	
25	OTB or online credit card		

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Points for debit card activity!

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Goal 1: Primary Financial Institution Relationships

Points	Description		
25	Special accounts with dividend application	<input type="button" value="Select"/>	1 selected
10	Special accounts by loan category	<input type="button" value="Select"/>	5 selected
10	For every year of membership after	3 years of membership	
	Credit score up to	400	
10	Credit score from	401 to 650	
20	Credit score from	651 to 750	
30	Credit score from	751 to 999	

Goal 2: Analyzing Member Savings Relationships

Points	Description
25	Additional general savings products present
	Non-IRA certificate products present

BT (2972) 6/07/16

Points for a credit score on file!

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Tiered Service Level Scoring VIEW ONLY

Goal 3: Analyzing Member Loan Relationships

Points	Description		
	Mortgage loans by loan category	<input type="button" value="Select"/>	5 selected
	Home equity loans by loan category	<input type="button" value="Select"/>	2 selected
	All other loans		
500-	Any loan product at a delinquency level of	2 or above	
25	Aggregate balance up to	1,000	
50	Aggregate balance from	1,001 to 5,000	
75	Aggregate balance from	5,001 to 10,000	
100	Aggregate balance from	10,001 to 25,000	
125	Aggregate balance from	25,001 to 999,999,999	
	Miscellaneous OTB loan account present		
	<input type="checkbox"/> Written off loans, set points to zero, and do not score		
	# of online credit card transactions up to	15	
10	# of online credit card transactions from	16 to 20	
20	# of online credit card transactions from	21 to 25	
30	# of online credit card transactions from	26 to 999	
	Dollar amount of credit card trans up to	1,000	
10	Dollar amount of credit card trans from	1,001 to 1,500	
20	Dollar amount of credit card trans from	1,501 to 2,000	
30	Dollar amount of credit card trans from	2,001 to 999,999,999	

Points for credit card activity!

Tiered Services Enhancements



On the drawing board

- Tally multiple scores every month:
 - One for normal Tiered Services points and rewards
 - 3 more for any purpose you can think of

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File Edit Tools Help

Tiered Service Level Scoring

VIEW ONLY

Goal 1: Primary Financial Institution Relationships

Points	Description	Fraud Score	eCommerce Score	Other Score
25	Special accounts with dividend application <input type="button" value="Select"/> 1 selected	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
10	Special accounts by loan category <input type="button" value="Select"/> 5 selected	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10	For every year of membership after 3 years of membership	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Credit score up to 400	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
10	Credit score from 401 to 650	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20	Credit score from 651 to 750	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
30	Credit score from 751 to 999	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Tally custom scores for specific behavior