DIRECTORY OF RESOURCES

2018 Development - Asterisk Intelligence

This booklet is a menu of informational resources developed by Asterisk Intelligence. A range of topics are included - products, services, educational events, tools, and guidebooks.

Documents noted with an orange arrow » can be found within your packet of resources for the CU*Answers 2018 Leadership Conference.

Take a moment to review the other resources in this book - Do other topics catch your eye? Visit the Asterisk Intelligence vendor table to pick up a hard copy of the document and talk to someone on the Asterisk Intelligence team.

Or, find electronic versions of these documents at cuanswers.com/asterisk-intelligence

ASTERISK INTELLIGENCE

Who is Asterisk Intelligence?

Flyer - 1 page

CONTACT ASTERISK INTELLIGENCE
ai@cuanswers.com
(800) 327-3478 x870
cuanswers.com/asterisk-intelligence

Be a Data Monster

New/Closed/All Memberships Dashboard

Booklet - 8-12 pages

Be a Data Monster

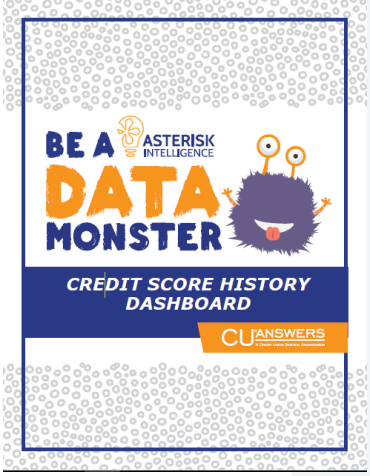
Audio/Online Banking Stats Dashboard

Booklet - 8-12 pages

Be a Data Monster

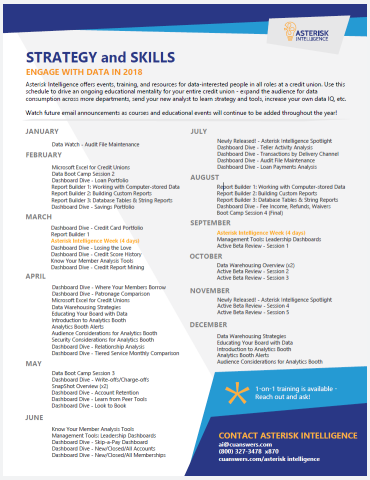
Credit Score History Dashboard

Booklet - 8-12 pages



Asterisk Intelligence Education - Engage with Data in 2018

Flyer - 1 page



STRATEGY and SKILLS

ENGAGE WITH DATA IN 2018

Asterisk Intelligence offers events, training, and resources for data-interested people in all roles at a credit union. Use this schedule to drive an ongoing educational mentality for your entire credit union - expand the audience for data consumption across more departments, send your new analyst to learn strategy and tools, increase your own data IQ, etc.

Watch future email announcements as courses and educational events will continue to be added throughout the year!

JANUARY

Data Watch - Audit File Maintenance

FEBRUARY

Microsoft Excel for Credit Unions
Data Boot Camp Session 2
Dashboard Dive - Loan Portfolio
Report Builder 1: Working with Computer-stored Data
Report Builder 2: Building Custom Reports
Report Builder 3: Database Tables & String Reports
Dashboard Dive - Savings Portfolio

MARCH

Dashboard Dive - Credit Card Portfolio
Report Builder 1
Asterisk Intelligence Week (4 days)
Dashboard Dive - Losing the Love
Dashboard Dive - Credit Score History
Know Your Member Analysis Tools
Dashboard Dive - Credit Report Mining

APRIL

Dashboard Dive - Where Your Members Borrow
Dashboard Dive - Patronage Comparison
Microsoft Excel for Credit Unions
Data Warehousing Strategies
Educating Your Board with Data
Introduction to Analytics Booth
Analytics Booth Alerts
Audience Considerations for Analytics Booth
Security Considerations for Analytics Booth
Dashboard Dive - Relationship Analysis
Dashboard Dive - Tiered Service Monthly Comparison

MAY

Data Boot Camp Session 3
Dashboard Dive - Write-off/Charge-offs
Dashboard Overview (v2)
Dashboard Dive - Account Retention
Dashboard Dive - Learn from Peer Tools
Dashboard Dive - Look to Book

JUNE

Know Your Member Analysis Tools
Management Tools: Leadership Dashboards
Dashboard Dive - Skip-a-Pay Dashboard
Dashboard Dive - New/Closed/All Accounts
Dashboard Dive - New/Closed/All Memberships

JULY

Newly Released! – Asterisk Intelligence Spotlight
Dashboard Dive - Teller Activity Analysis
Dashboard Dive - Transactions by Delivery Channel
Dashboard Dive - Audit File Maintenance
Dashboard Dive - Loan Payments Analysis

AUGUST

Report Builder 1: Working with Computer-stored Data
Report Builder 2: Building Custom Reports
Report Builder 3: Database Tables & String Reports
Dashboard Dive - Fee Income, Refunds, Waivers
Boot Camp Session 4 (Final)

SEPTEMBER

Asterisk Intelligence Week (4 days)
Management Tools: Leadership Dashboards
Active Beta Review - Session 1

OCTOBER

Data Warehousing Overview (v2)
Active Beta Review - Session 2
Active Beta Review - Session 3

NOVEMBER

Newly Released! – Asterisk Intelligence Spotlight
Active Beta Review - Session 4
Active Beta Review - Session 5

DECEMBER

Data Warehousing Strategies
Educating Your Board with Data
Introduction to Analytics Booth
Analytics Booth Alerts
Audience Considerations for Analytics Booth

1-on-1 training is available - Reach out and ask!

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2018 Dashboard Dive Webinars

Flyer - 1 page

Webinar Series: Dashboard Dives

Thursdays 3:00pm EST

Catch the vision for quick and powerful insights discovered inside CU*BASE dashboards!
No query involved - 90+ point-and-click dashboards give maximum control of your data.

Register for courses online at **study.cuanswers.com**

LEARN YOUR DATA

2/15 – Portfolio Analysis: Loans
2/22 – Portfolio Analysis: Savings
3/1 – Portfolio Analysis: Credit Cards
3/8 – no webinar this week
3/15 – Losing the Love/Member Behaviors
3/22 – Credit Score History Dashboard
3/29 – Credit Report Data Mining
4/5 – Where Your Members Borrow
4/12 – Patronage Comparison
4/19 – Relationship Analysis
4/26 – Tiered Service Monthly Comparison
5/10 – Loan Write-Off/Charge-Offs
5/17 – Account Retention
5/24 – Learn From Peer Tools
5/31 – Look to Book Loan Applications
6/7 – Skip-a-Pay Dashboard
6/14 – New/Closed/All Accounts
6/21 – New/Closed/All Memberships
7/5 – Teller Activity Analysis
7/12 – Transactions by Delivery Channel
7/19 – Audit CU File Maintenance
7/26 – Loan Payment Analysis
8/2 – Fee Income, Refunds, and Waivers

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Visit the Store

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Visit the Store!

store.cuanswers.com > Solutions > Asterisk Intelligence

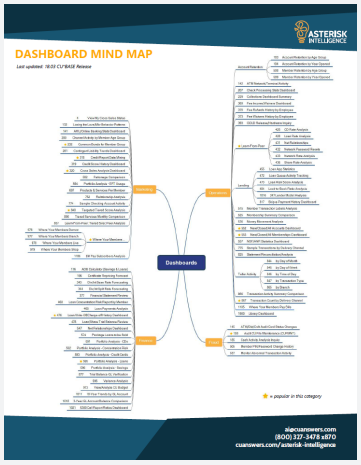
Asterisk Intelligence

and more. . .

ASTERISK INTELLIGENCE

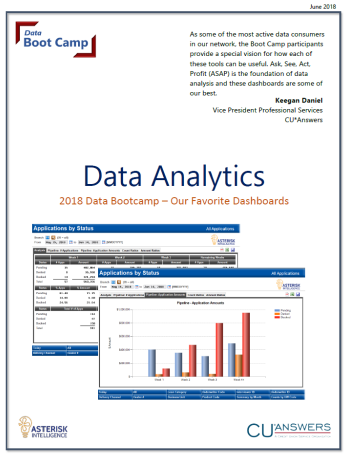
Dashboards Mind Map

Flyer - 1 page



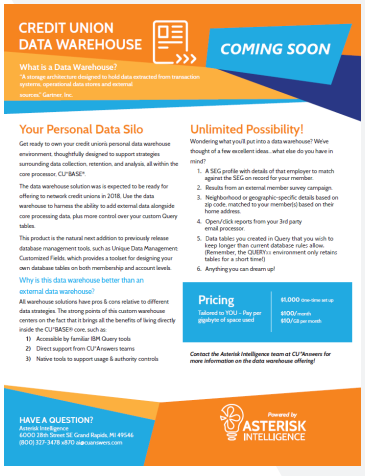
Dashboards - 2018 Boot Camp Favorites!

Booklet - 12 pages



Data Warehouse - *Coming Soon 2018*

Flyer - 1 page



Custom DEX (Data EXchange)

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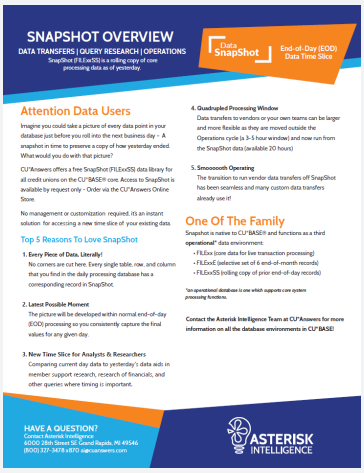
SnapShot Overview & FAQ

Flyer - 1 page



What is a Database View?

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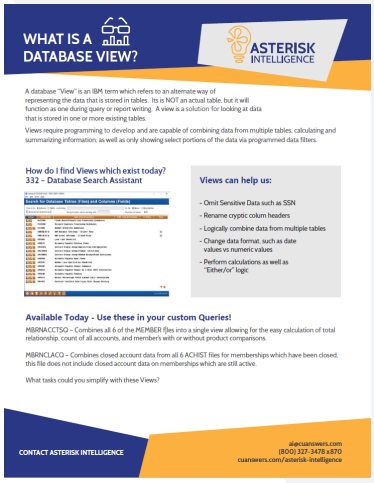


Analytics Booth is an external data warehouse with a daily data feed of 70+ data points from CU*BASE for alerts, trending, and analysis.

Email alerts are delivered to your inbox every day, or customized to only send when certain changes are seen.

Access historical trends and data via a web browser - No sensitive data means you can let *anyone* see information on your financial and product portfolios.

Analytics Booth Overview

Flyer - 1 page

Analytics Booth Board Briefing

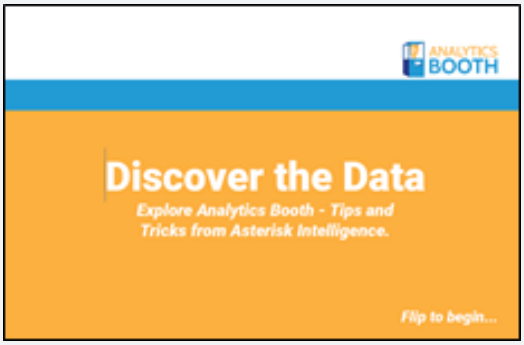
Flyer - 1 page

Getting Started Guide for Analytics Booth

Booklet - 8 pages

Analytics Booth Flip Cards

Card Book - 12 pages



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