SCHEDULE OF EVENTS

OVER 50 OPPORTUNITIES TO ENGAGE WITH DATA IN 2019

Review our full 2019 schedule of events and share these opportunities with all of your teams! Encourage each of your departments to join the Asterisk Intelligence team as we navigate data strategies, data management, follow up opportunities, and help to develop a deeper understanding of the database.

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

JANUARY

Getting Started with Unique Data Management (UDM)
Introduction to Visual Analytical Tools (VAT)

FEBRUARY

Asterisk Intelligence Week (4 days)
Dashboard Dive - Accrual Dashboard (Loan Interest, Certificates, and Dividends)

MARCH

Educating Your Board with Data
Dashboard Dive - Loan Productivity Dashboard
Dashboard Dive - Portfolio Analysis: EFT Usage
Dashboard Dive - Where Your Members Borrow

APRIL

Microsoft Excel for Credit Unions
Dashboard Dive - Where Your Members Shop
Report Builder 1: Working with Computer-stored Data
Report Builder 2: Building Custom Reports
Report Builder 3: Database Tables & String Reports
Dashboard Dive - Look-to-Book
Data Mining - "Know Your Member" Analysis Tools
Dashboard Dive - Common Bonds
Dashboard Dive - Payveris Bill Pay Dashboards
CU*BASE Management Tools - Leadership Dashboards

MAY

Getting Started with Unique Data Management (UDM)
Dashboard Dive - Activity Validation Dashboard
Dashboard Dive - Loan Write-Off/Charge-Off History Dashboard
Asterisk Intelligence Week (4 days)
Dashboard Dive - Why Your Members Call
Introduction to Visual Analytical Tools (VAT)
Educating Your Board with Data
Dashboard Dive - Fee Waiver and Fee Refund Dashboards

JUNE

Dashboard Dive - Loan Risk Score Analysis
Dashboard Dive - Skip-a-Pay Dashboard
Dashboard Dive - Money Movement Analysis

JULY

Dashboard Dive - Loans Paid Ahead
Microsoft Excel for Credit Unions
Dashboard Dive - Relationship Analysis
Getting Started with Unique Data Management (UDM)
Dashboard Dive - Teller Activity Dashboard Tools

AUGUST

Dashboard Dive - Transaction Count by Delivery Channel
Dashboard Dive - Credit Report Data Mining
Asterisk Intelligence Week (4 days)
Introduction to Visual Analytical Tools (VAT)
Dashboard Dive - New/Closed/All Accounts
Dashboard Dive - New/Closed/All Memberships

SEPTEMBER

Educating Your Board with Data
Dashboard Dive - Account/Member Retention Dashboards
Dashboard Dive - Data Warehousing/Library Management Tools
Dashboard Dive - Concentration Risk by Member/Portfolio Analysis Concentration Risk
Channel Activity by Member Age

OCTOBER

Getting Started with Unique Data Management (UDM)
Dashboard Dive - Tiered Services Monthly Comparison
Report Builder 1: Working with Computer-stored Data
Report Builder 2: Building Custom Reports
Report Builder 3: Database Tables & String Reports
Microsoft Excel for Credit Unions
Dashboard Dive - Member List Generator
Dashboard Dive - Cross Sales Analysis Dashboard
Data Mining - "Know Your Member" Analysis Tools
Dashboard Dive - Collections Dashboard
CU*BASE Management Tools - Leadership Dashboards
Dashboard Dive - Portfolio Analysis Tools - Loans and Savings

DECEMBER

Asterisk Intelligence Week (4 days)
Introduction to Visual Analytical Tools (VAT)

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LEARN STRATEGY & SKILLS

HARNESS THE POWER OF YOUR DATA WITH BUSINESS INTELLIGENCE

Asterisk Intelligence offers events, training, and resources for data-interested people in all roles at a credit union. Explore all of the eduational opportunities and continue 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.

ASTERISK INTELLIGENCE WEEK

A full four days of training hosted by the Asterisk Intelligence team, the events held during this week cover data analytics and data warehousing solutions. Join us for three days of in-person training focusing on CU*BASE dashboards, data management tools, and report builder training. The fourth day focuses on webinar-based training, covering the latest products and warehousing solutions offered by CU*Answers.

REGISTER

cuanswers.com/solutions/asterisk-intelligence/asterisk-intelligence-week

ALUMNI COMMENT

"*If I could describe Asterisk Intelligence Week with one word, it would be data. As we continue to push into the digital age and beyond as an industry, understanding our members by using the data at our fingertips is vital for not only our survival but our flourishment! With this data, we begin to understand our members and can target them with products and services that would be beneficial to them. Furthermore, the data will help us streamline our costs, identify weak points, and provide us insights that would otherwise be lost.*"
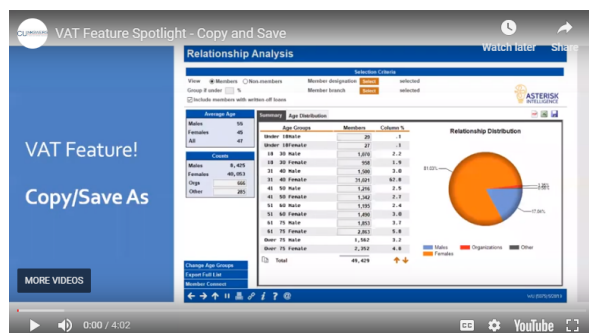
-Joey Czellar, Affinity CU

ONDEMAND WEBINAR CLASSES

Many of the regular live classes are recorded and made available online to attend at your convenience. Visit the Data Analytics channel of ondemand.cuanswers.com to browse the library of educational classes, including a series of 3 sessions teaching the Query tool, individual reviews of 35+ dashboards, and more.

REGISTER

ondemand.cuanswers.com/channel/data-analytics

DASHBOARD DIVES

Join the Asterisk Intelligence Team on Thursdays from 3-4pm as we dive into over 30 interactive, analytical tools in 2019. Spend a full hour discussing the A.S.A.P. mentality that is behind each dashboard, the different ways of looking at each data point, and how you can export the data on the screen to an Excel or query file. Dashboard topics range widely and include but are not limited to: lending, card analysis, activity channels, savings portfolio, employee tool usage, and much more.

REGISTER

study.cuanswers.com

CU*ANSWERS UNIVERSITY

The Asterisk Intelligence team participates each year in teaching CU*Answers University courses alongside many other departments. In 2019, the Asterisk Intelligence team will be teaching 13 different courses under the CU*Answers University umbrella a combined total of 40 times. Courses include Getting Started with UDM, Introduction to VAT, Educating Your Board with Data, the Report Builder courses, and much more!

REGISTER

cuanswers.com/resources/edu/courses/?cat=32

1:1 TRAINING OPPORTUNITIES

Interested in a one on one training session with the Asterisk Intelligence Team? We have both hosted at CU*Answers team to team in-person query training, and hosted team to team query training via webinar with our clients further away. Contact us to schedule a one on one or team to team training today!

REGISTER

store.cuanswers.com/store/asterisk-intelligence

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