

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-offs/Charge-offs
SnapShot Overview (x2)
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 (x2)
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!

CONTACT ASTERISK INTELLIGENCE

ai@cuanswers.com

(800) 327-3478 x870

cuanswers.com/asterisk-intelligence