

WebFOCUS Analytics for Credit Unions

Powerful, Easy-to-Use Analytics That Drive Strategic Growth, Member Engagement, and Cost Efficiency

Highlights

- A single, integrated view of the business ensures everyone is on the same page with consistent data
- Visualize and discover insights, trends, and valuable opportunities in operations, finance, and marketing
- Self-service for all users accelerates information delivery and relieves IT backlog
- InfoApps™ dramatically simplify information access, replacing thousands of spreadsheets and reports



Information Builders helps credit unions transform and unite all data into powerful insight, action, and business value, enabling smarter decisions, strengthening member relationships, improving productivity, and driving growth.

Credit unions spend a fraction on analytics technology and solutions compared to their regional banking counterparts. This has fueled a growing competitive disparity in targeted marketing, member acquisition and retention, personalized experience, sales performance, pricing optimization, and operational efficiency.

Most analytics offerings exacerbate this disparity because they aren't designed to meet the unique needs of credit unions. For example, analytics solutions from core system providers are siloed, not integrated, and often antiquated, uniting only a fraction of the credit union's systems, products, and data. Visualization tools promise a quick start, but offer limited functionality that is suitable principally for business analysts and power users unable to meet their strategic needs – such as 360° view, data quality and mastering, predictive analytics, and member-facing initiatives. Finally, 'megavendor' analytics solutions can be complex and expensive.

WebFOCUS Analytics for Credit Unions anticipates and comprehensively addresses these and many more of the unique needs of credit unions, allowing them to benefit from the same insights as their regional and global banking counterparts – at an attractive price point.

Information Builders helps organizations transform data into business value. Our business intelligence, integration, and data integrity solutions enable smarter decision-making, strengthen customer relationships, improve performance, and drive growth.

WebFOCUS Analytics for Credit Unions provides the widest range of analytics and business intelligence (BI) for operations personnel, analysts and power users, managers, executives, and report writers across the credit union.

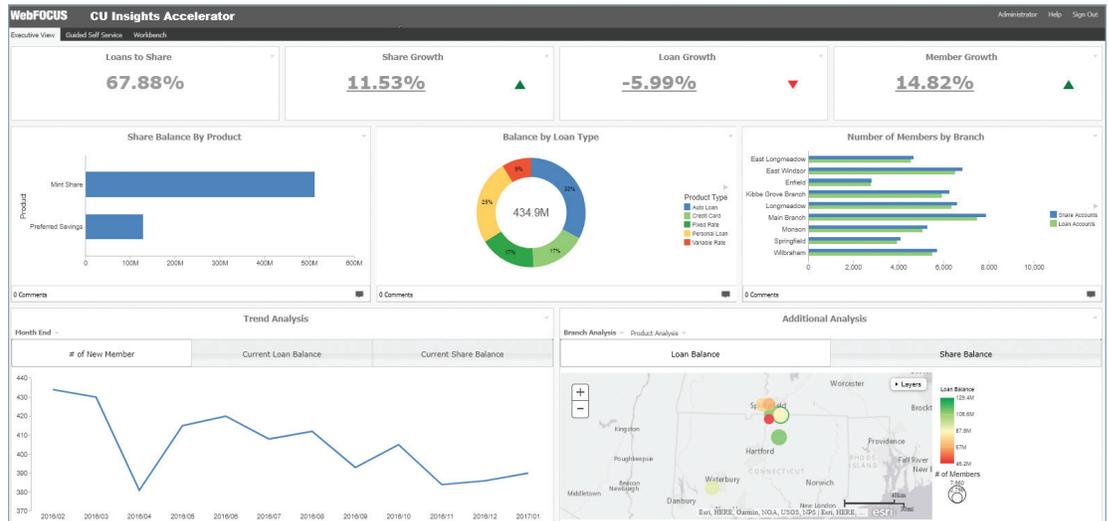
Key Benefits

WebFOCUS Analytics for Credit Unions provides the widest range of analytics and business intelligence (BI) capabilities for all front-line personnel, managers, executives, business analysts and power users, and report writers. It also features these attractive characteristics, necessary for success:

- **Rapid Start.** Information Builders’ Accelerator for Credit Union Operations provides pre-built executive dashboards, reports with In-Document Analytics, a report generator, visualization and data discovery tools, and a logical reporting model – each providing immediate out-of-the-box analytics, productivity, business value, and free-form exploration – all ready to use, with minimal training
- **Self-Service.** All credit union personnel can independently explore, visualize, and report on all data they are authorized to access – dramatically eliminating dependence on IT staff
- **Optimal User Adoption.** Analytics are easy to use for anyone, even non-technical business users, providing quick answers to urgent questions to ensure widespread usage and return on your investment
- **Affordability and Long-Term Value.** The solution’s powerful technology and extensible Accelerator enables credit unions to unite all data sources and systems, and to rapidly add and integrate new capabilities such as data quality, predictive and prescriptive analytics, social media, and big data, as new requirements and opportunities arise

Accelerator for Credit Union Operations

Information Builders’ Accelerator for Credit Union Operations jump-starts analytical insights with a pre-built executive dashboard, reports, in-document analytics, visualizations, and a report generator. Key performance indicators (KPIs) provide insight into shares, loans, member growth, and more, while charts depict trends and patterns for analysis. Reports enable users to drill down to increasing levels of detailed data as desired. Collaboration allows authorized users to browse, add, and share comments about the data.



The executive dashboard aggregates and visually consolidates information across both core and siloed systems for product, branch, and member data.

InfoApps™ – Report Generator

Users can quickly create just the reports they want, replacing hundreds or thousands of individual reports with just one or two InfoApps™. This patented technology simplifies and facilitates access to information, greatly enhancing the way they manage their business.

The screenshot shows the InfoApps Report Generator interface, divided into three main sections: Business Area, Filters, and Options. Callout boxes provide detailed explanations for various features:

- Subject Areas:** Enables users to identify the subject of the report. The interface shows options for Product, Member, and Branch under Subject Areas, and Loan and Share under Business Type.
- Filters:** Filters are chained to selected domains and enable users to find exactly what they need. The interface shows dropdown menus for Product Type (ALL), Product (Fixed Rate Personal Loan, New Auto Loan - Direct, etc.), Branch (ALL, East Longmeadow, etc.), and Member Age Range (ALL, 18 - 24, 25 - 39, 40 - 54, 55 - 64, 65+, Under 18).
- Report Options:** Allows users to save a newly created report, which can be attached to any existing dashboard, portal, or the Executive View. The interface includes a heading field, a Table of Contents section (No/Yes), and a Format section (HTML, PDF, Excel, etc.).
- Table of Contents:** The table of contents enables data to be split across multiple Excel worksheets based on the sort columns select.
- Schedule:** Allows a user to schedule named reports, and send the output in a variety of formats via FTP, printer, e-mail, fax, mobile device, etc.
- Group By:** Logically sort information using one or more dimensions. The interface shows a list of fields like Product Category, Employee Birthdate, etc., and a Product dropdown.
- Measures:** Select the measures by which users wish to analyze. The interface shows a list of measures like Average Current Loan, Average Loan Term, etc., and an Average Initial Loan dropdown.
- Age Range:** Age analysis can be created within customer or member populations.
- Output Formats:** Users can generate reports in their preferred format – Excel, PDF, PowerPoint, Active Technology, etc.

The role, capabilities, and value of an InfoApp™. Users can select multiple subjects, fields, and filters to create their own reports.

What Are InfoApps?

InfoApps™ are highly interactive analytical applications designed with non-technical users in mind. They deliver interactive content, data visualizations, charts, graphs, and reports. Content generated by an InfoApp™ can be published to hundreds or thousands of stakeholders – even members, if desired. Any authorized user can now become an analytics author without assistance, and distribute results to their workgroup, credit union personnel, and members.

Logical Reporting Model and Metadata

Data is integrated across six domains: Member, Accounts, Share Accounts, Loan Accounts, Employees, and Branches. Links between these domains facilitates summary and detail reporting and analytics across the entire model.

WebFOCUS Foundation

Our WebFOCUS BI and analytics platform is the foundation of this solution. It provides an integrated portfolio of capabilities, including data management, visual discovery, predictive analytics, and operational intelligence in a single platform, coupled with an exceptional user experience.

How to Get Started

Contact us. You'll discover how WebFOCUS Analytics for Credit Unions jump-starts the analytics journey, provides maximum user adoption, and illuminates the path to profitable growth, operational efficiency and member satisfaction.

Find Out More

We can help you succeed. Talk to your local Information Builders representative to learn how. Visit us at informationbuilders.com, e-mail askinfo@informationbuilders.com, or call **(800) 969-4636** in the U.S. and Canada. To improve your skills, visit education.ibi.com.

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