FEATURED CLIENTS

Merrimack Valley CREDIT UNION

NORTH SHORE FEDERAL CREDIT UNION since 1957

LEADERS CREDIT UNION

American Heritage CREDIT UNION

TruMark Financial Credit Union

PROSPERITY BANK

People First Federal Credit Union

Penn Community Bank

INTERIOR FEDERAL CREDIT UNION

Meridian Trust FEDERAL CREDIT UNION

WASATCH PEAKS CREDIT UNION

SECURITY BANK OF KANSAS CITY

Sooper credit union

LAUNCH CREDIT UNION

FIRST HERITAGE REALTY ALLIANCE

Sun East Federal Credit Union

GREAT RIVER Federal Credit Union

Southland CREDIT UNION

LGE Community Credit Union

★★★★★

"The expertise we get from the Datava team is not something we're used to getting with some of our other vendors."

Breana Wolfert
AVP, Branch Operations Project Management
American Heritage Credit Union

★★★★★

"Datava understands our needs, they understand what it is we're trying to accomplish, and they find the solution. Datava really works well with me and my team."

Howard Meller
CEO
People First Federal Credit Union

★★★★★

"Datava is very graphic. It really tells the employee the strengths and weaknesses of the member relationship based on colors."

Kevin Tressel
CIO
American Heritage Credit Union

DATAVA

5 REASONS OTHER SOFTWARE IMPLEMENTATIONS FAIL

According to a recent survey of businesses, over 50% of software implementations are unsuccessful.* Here are the top five reasons why.

1 INTEGRATION — Their software doesn't communicate with your various systems

2 CONFIGURABILITY — Their software doesn't do exactly what you need it to and can't be configured

3 UNRELIABLE DATA — Manual data imports and lack of validation result in unreliable metrics and reports

4 DIFFICULT TO USE — Complex forms, confusing navigation, and unnecessary features equal reduced end-user adoption

5 COST — Unreasonable fees and hidden costs make their system too expensive to justify

5 WAYS WE'RE DIFFERENT SO YOU SUCCEED

FULLY INTEGRATED

Datava seamlessly integrates with a vast and ever-growing list of vendors, providing our clients with an extensive array of options to best meet their integration needs.

HIGHLY CONFIGURABLE

Your bank is unique, and an out-of-the-box solution would make you compromise that. Datava's system provides unparalleled levels of configurability, ensuring the system aligns with your bank's goals and culture.

DATA VALIDATION

With smart record matching, duplicate data checks, smart forms validation, and more, our world-class data goes in, giving you reliable metrics every time.

SIMPLE USER INTERFACE

Our system is designed to be used by everyone, from tellers to the CEO. This is done by configuring each user's experience ensuring they see just what they need to be more effective.

$ CLEAR ROI

Our priority is rapidly delivering solutions that have a direct impact on your goals and objectives. This ensures that both ROI and total cost of ownership are easily measurable and transparent.

*SoftwareAdvice.com CRM survey

DATAVA

DATA ACTIVATION PLATFORM

Banks possess more data about their customers than Amazon, but this data is often fragmented and inaccessible. Datava's Data Activation Platform enables banks to become truly data driven, to better serve their customers and to collaborate inside and outside their institution. It is the only platform capable of receiving any type of data, normalizing that data, and delivering that data to all areas of the organization. Datava's AI engine drives key decisions, improves productivity, and ensures the right product is delivered to the right customer at the right time.

THE DATAVA DIFFERENCE

COLLECT ALL YOUR DATA
Gather your data from every facet of your organization. Utilize this data to empower staff and deepen customer relationships.

FILL IN THE GAPS
Bridge information disparities where there is a lack of data. Improve reporting & forecasting for a more accurate overview of your bank.

CURATE AND NORMALIZE YOUR DATA
Create, organize, and maintain datasets for easy accessibility, as well as structure, index, and catalogue data to be more readily available to all users within your bank.

OBTAIN METRICS FROM YOUR DATA
Identify trends, patterns, and performance indicators, to facilitate data-backed decisions, optimize processes, and drive growth.

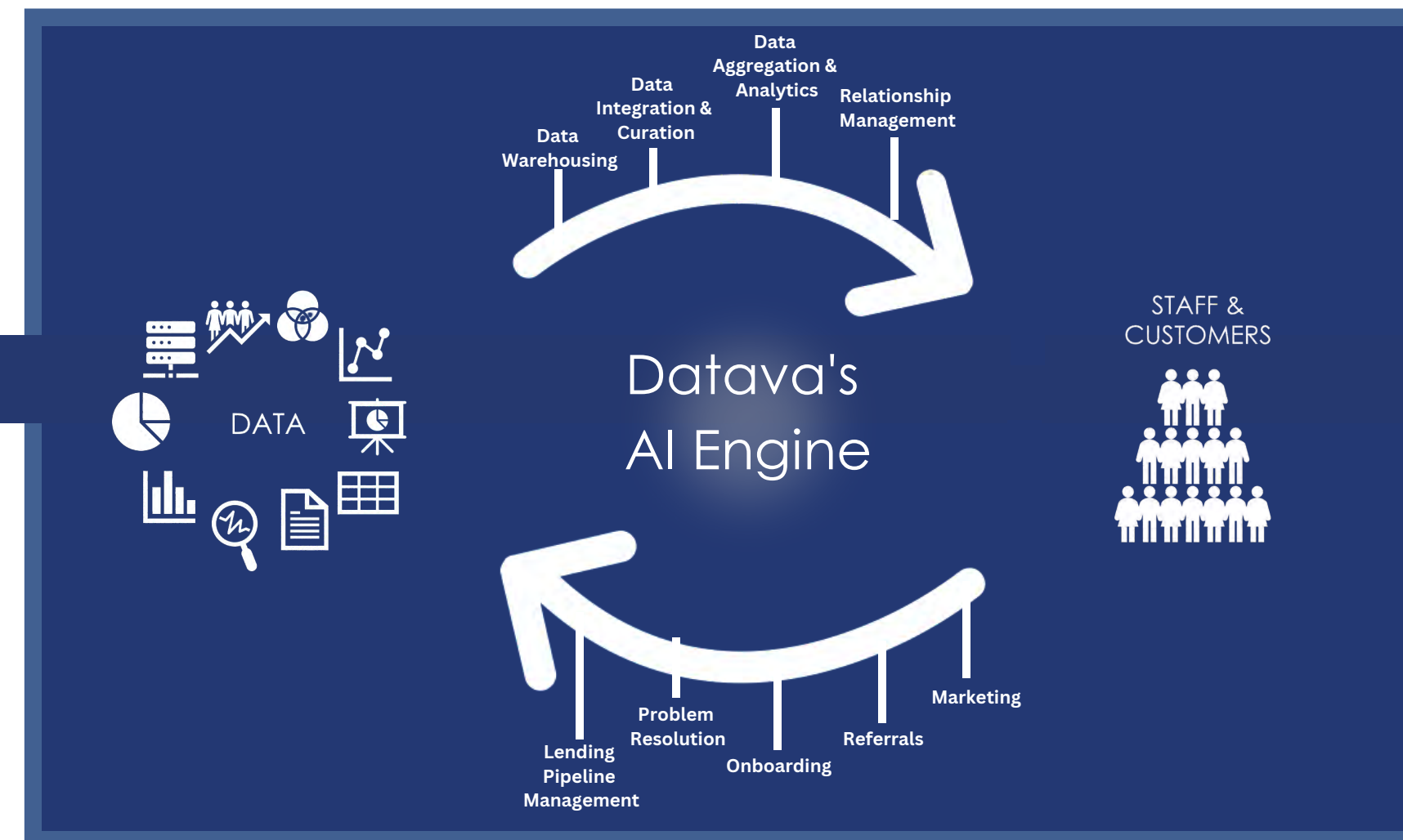### ACTIVATE YOUR DATA IN WORKFLOWS
Boost productivity, and enhance decision-making by ensuring that the right information is available to the right person at the right time.

PERFORM PREDICTIVE ANALYTICS
Use statistical techniques and machine learning algorithms to analyze your data, identify patterns, and make predictions about future events or behaviors.

COMPLETE SOLUTION

Datava's AI Engine

DATA

STAFF & CUSTOMERS

Data Warehousing · Data Integration & Curation · Data Aggregation & Analytics · Relationship Management

Lending Pipeline Management · Problem Resolution · Onboarding · Referrals · Marketing

Datava not only consolidates and curates data from multiple, disparate systems into actionable information, but also enables that data to be pushed back through workflows and other primary functions. This data can then be more easily utilized by staff and customers alike and drive informed decision making, improved customer experiences and increased productivity.

DATAVA

THE DATAVA DIFFERENCE

Go beyond simply reacting to interacting with your customers with Datava's Relationship Manager. Get a complete understanding of every customer and how to follow-up, when to follow-up, and how your bank can best serve them.

From account balances, to closed account alerts, to problems, you can understand not just what has happened, but how to best help grow that relationship today and in the future.

ACCOUNT INSIGHT
See which accounts customers have, how often they are using them, and what the balances of the accounts are.
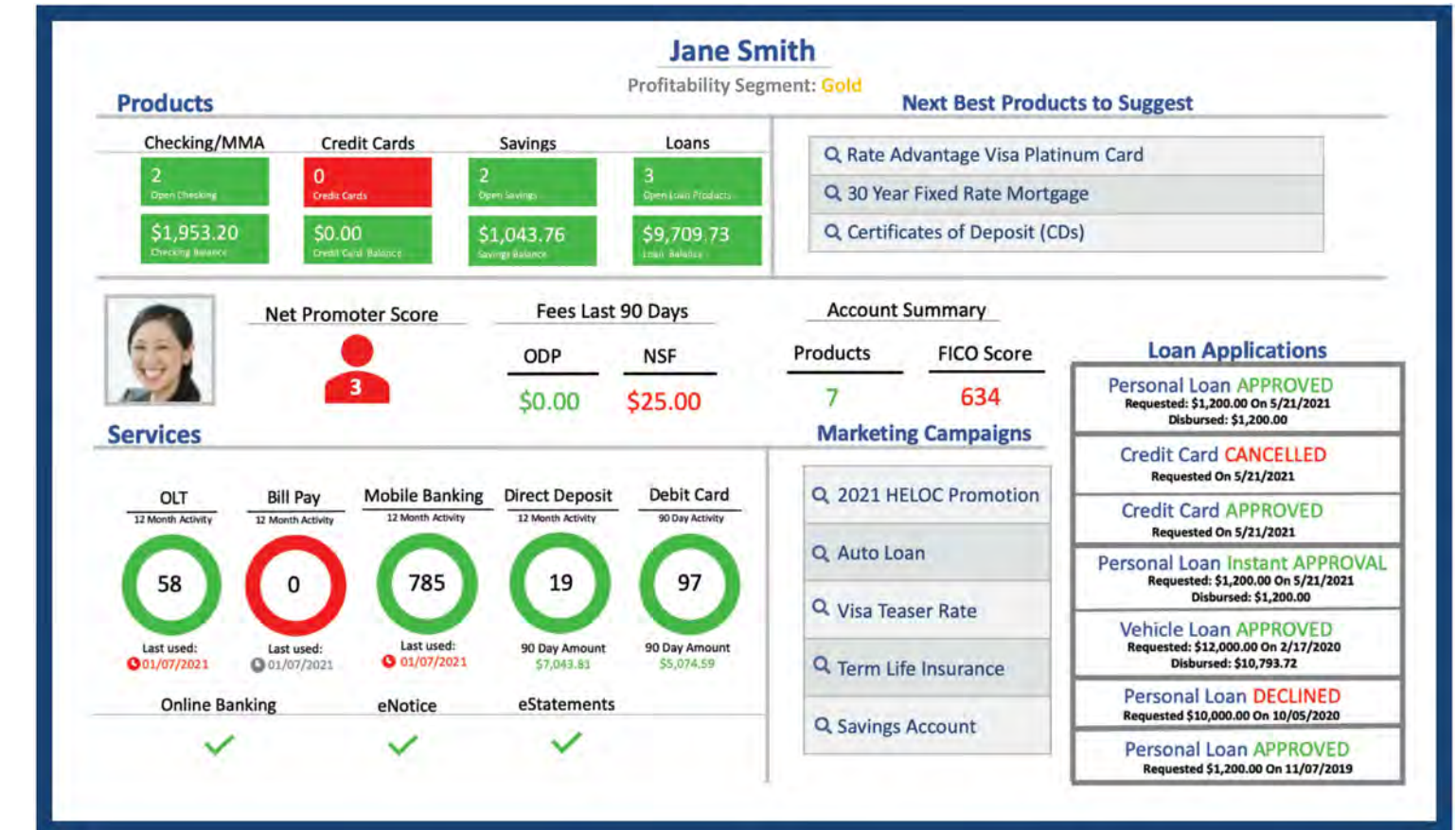
CUSTOMER BIO
Track important information about customers that will be useful to best serving them later. Set birthday reminders, track communications, household information, and other useful personal information.

ISSUE MANAGEMENT
Easily identify any concerns, problems or other information the customer has provided that can help you understand how to best help them, and easily see what the status of those are.

LIFETIME VALUE
See how your customers currently are projected to impact the bank and see how that number can be improved through behavioral changes, account restructuring and more.

NEXT BEST PRODUCT PROMPTS
Easily identify which products would be of use to your customers and facilitate your employees communicating those opportunities to them.

TRACK FINANCIAL GOALS
Transform your relationship with your customers by helping them achieve their financial goals, and help them track where they are at in achieving them.

In one centralized dashboard, understand everything about your customer. See what their balances are, the health of their account, which products would most benefit them, and how you can best serve them
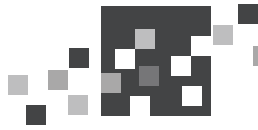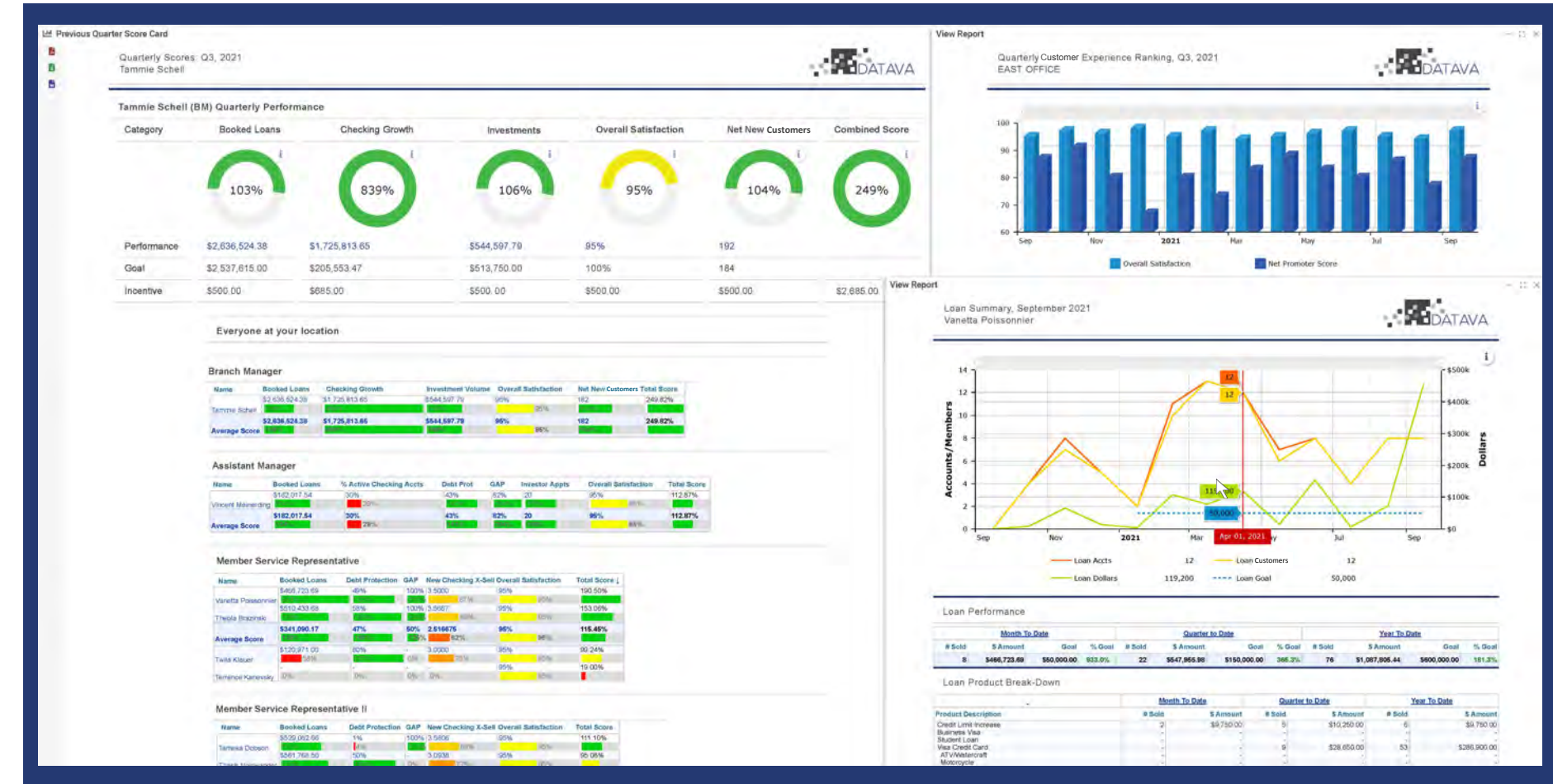
DATAVA

GOALS AND INCENTIVE TRACKING
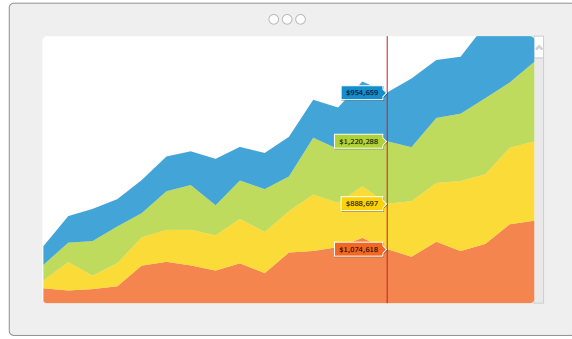
With Datava's Sales Performance Tracking System, "the sky is the limit." Get accurate, online access to all sales, referral and incentive results. Customized dashboards for **any metric**, across **any time interval**, at **every level of your organization**. Provide your managers with the information they need to coach and improve performance.

THE DATAVA DIFFERENCE

EMPLOYEE LEVEL REPORTS
Improve employee performance with automated smart goals at the employee, branch, region, and top level.

ACTIONABLE DASHBOARDS
Maximize training effectiveness with dashboards and reports that clearly show employee performance and areas for improvement.

REFERRAL SUCCESS RATIOS
Measure, coach, monitor and improve inter and intradepartmental referral effectiveness.

MULTIPLE SOURCE INTEGRATION
Get a complete picture of each customer's product and service profile with Datava's ability to take data from any system, even third party vendors, and centralize that data in one location.

CUSTOMIZED INCENTIVE PROGRAMS
Reduce managerial and IT burden by automating any incentive program throughout the organization.

ANY METRIC ON ANY SEGMENT
Quickly analyze ANY sales or referral metric. Identify customer's purchase behaviors, segment by demographic, analyze new vs. existing cross-sell, view accounts per household, profitability, etc.

GOALS AND INCENTIVE DASHBOARD

Increase efficiency and effectiveness in your sales process with advanced cross-sell, incentive, and account metrics. Determine which employees effectively identify customers' needs, offer products, and deliver service solutions. Reward high-performing employees and coach underachievers.

DATAVA

THE DATAVA DIFFERENCE

Datava's Onboarding Manager ensures consistent implementation of the bank's onboarding process and allows management to hold employees accountable for the customer experience.

Employees are provided with a daily list of onboarding action items. Customer emails and form letters are quickly and efficiently generated at the prescribed time. Managers get real-time updates on employee and branch performance.

AUTOMATED SCHEDULING
Ensure every prospect and customer receives follow-up with automated scheduling that syncs with employee calendars and sends reminders.

DASHBOARDS
Improve employee productivity with easy-to-understand dashboards, automated task lists, follow-up scheduling, and collaborative customer management.

CLOSED ACCOUNT ALERTS
Reduce lost customers with closed account alerts. These alerts allow employees to proactively reach out to customers before the relationship is lost.

DATA SYNCING
With customer profile syncing, analyze when new customers are opening additional accounts, using your product, and/or other major retention events.
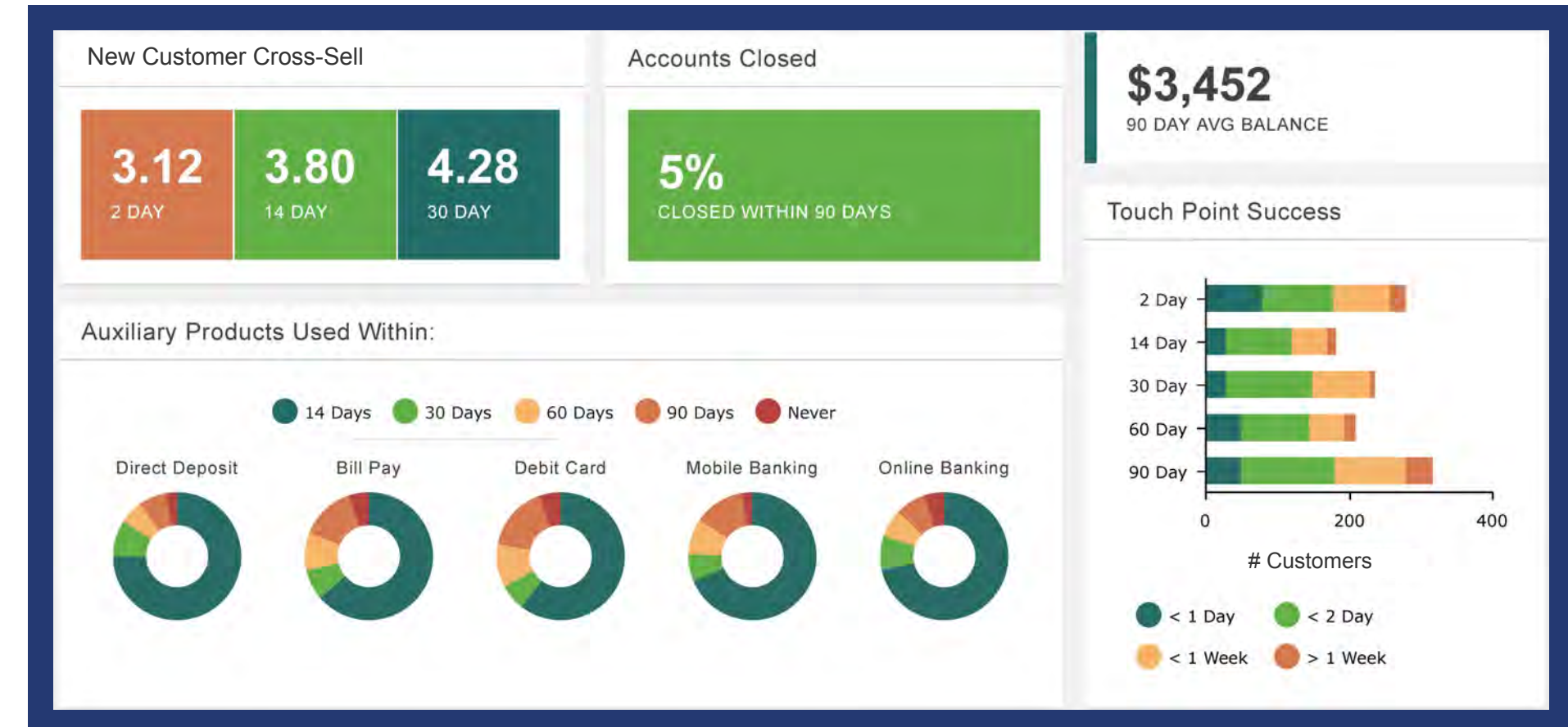
MANAGERIAL NOTIFICATIONS
Managers are always "in the loop" with automated alerts for missed/late tasks, managerial purview of employee schedules, and real-time insight into pipeline and onboarding progress for each prospect and customer.

NEXT BEST PRODUCT PROMPTS
Anticipate customer needs during the onboarding process with next-best product prompts.

At a glance, assess onboarding effectiveness and identify and recover at-risk accounts. Facilitate new customer onboarding, increasing the likelihood that customers adopt you as their primary institution.

DATAVA

Datava's campaign success management tool will seamlessly track the effectiveness of your marketing campaigns, giving you the insight into what works, what doesn't, and how to improve your marketing reach.

You can quickly determine the actual realized dollars produced from a marketing campaign, and determine the value of one method over another.

THE DATAVA DIFFERENCE

COMPARE CAMPAIGN METHODS
Analyze the effectiveness of direct vs. indirect, email vs. paper, and print vs. targeted.

GET ACTUAL DOLLAR VALUES
Determine the dollar amounts that are actually generated through email campaigns.

SEGMENT PROSPECTS AND CUSTOMERS
Use deep-dive analytics to determine which type of marketing works best for which segment of customer. Segment by demographics, customer behaviors, and more.

DRILL-DOWN BY PRODUCT
Determine the effectiveness of your campaign by individual products, product groups, and totals.

INCORPORATE FRONT-LINE STAFF WITH MARKETING CAMPAIGNS
By using this tool with some of our others, you can seamlessly integrate your marketing campaigns with front-line staff to coordinate customer reach.
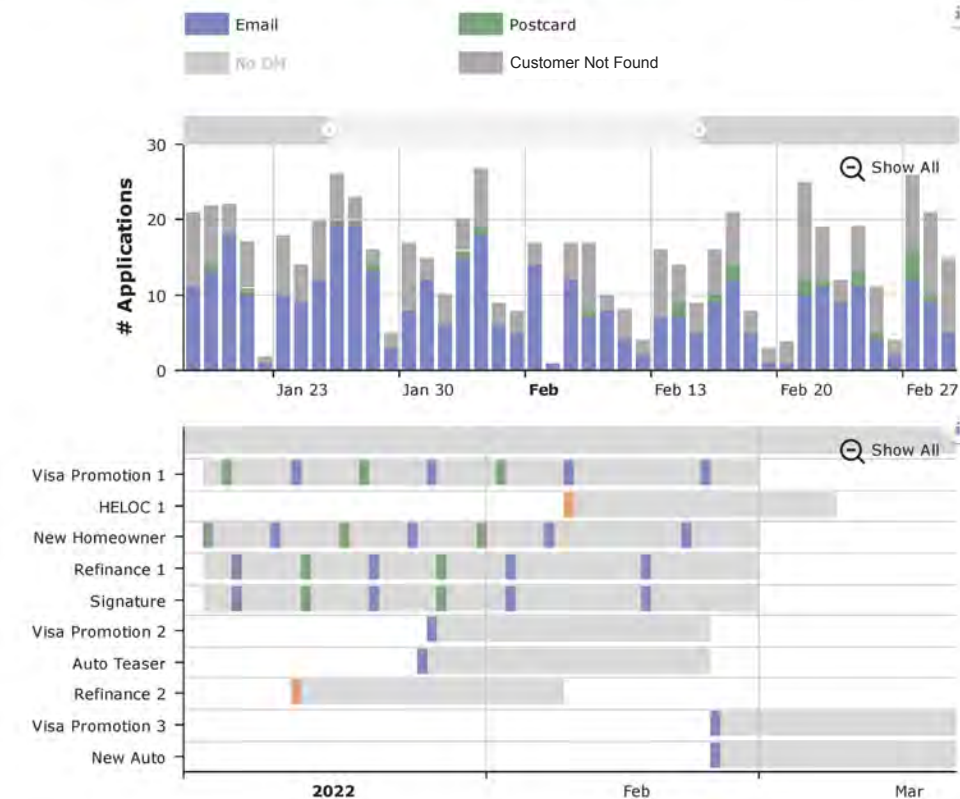
ANALYZE CUSTOMER LOYALTY
Determine if marketing is having an effect on customer churn, net promoter and more.

Easily see how your campaigns are impacting sales, customer loyalty, and employee performance. See breakouts by product type, campaign type, and determine which mixture of touches are most influential to a customer or prospect.

Campaign Summary (All Campaigns), Q1, 2022

Product	Email		Post card		No DM		Customer		Total	
	# Apps	Dollars	# Apps	Dollars	# Apps	Dollars	# Apps	Dollars	# Apps	Dollars
All Loans	502	$12,291,376.74	52	$4,665,027.48	5406	$45,437,212.98	223	$16,085,692.52	3499	$57,475,309.72
Refinance	234	$1,670,700.00	36	$250,200.00	1081	$4,016,442.71	110	$358,650.00	1461	$6,295,992.71
Home Equity	78	$3,772,450.00	20	$681,500.00	453	$31,501,146.82	53	$3,362,499.00	604	$39,317,595.82
HELoC	53	$2,735,999.00	14	$584,500.00	300	$23,284,591.96	41	$2,519,999.00	408	$29,125,089.96
Home Equity	25	$1,036,451.00	6	$97,000.00	153	$8,216,554.86	12	$842,500.00	196	$10,192,505.86
Auto Loans	162	$3,848,226.74	33	$733,327.48	536	$11,796,252.08	106	$1,950,810.52	837	$18,328,616.82
Visa	-	-	-	-	216	$2,401,271.37	35	$384,133.00	251	$2,785,404.37
Signature	-	-	-	-	266	$722,100.00	10	$29,600.00	276	$751,700.00

Loan applications by marketing source

REFERRAL MANAGEMENT

With Datava's sophisticated Referral Management send track and report referral opportunities in real time between departments Cut response time with rapid,   multi- directional communication and maximize cross- sell by providing the right recommendations for customers' needs. Utilize detailed reporting and analytics to better understand referral opportunities or incentivize your employees.

THE DATAVA DIFFERENCE

IMPROVE RESPONSE TIME
Real-time routing notifies employees of opportunities as they happen and ensures the referral is sent to the right person in the right department for faster follow-up.

ACQUIRE NEW CUSTOMERS
Enable your front-line staff to refer products and services to new customers, linking opened accounts to the referrals.

EXPAND CUSTOMER RELATIONSHIPS
Build trust and deepen relationships with your customers by recommending beneficial products that correlate with their actual needs and life events.

COLLECT VITAL INFORMATION
Referral forms are dynamic, based on the type of referral that is being made. Track the full history of referrals and view detailed reporting and analytics.
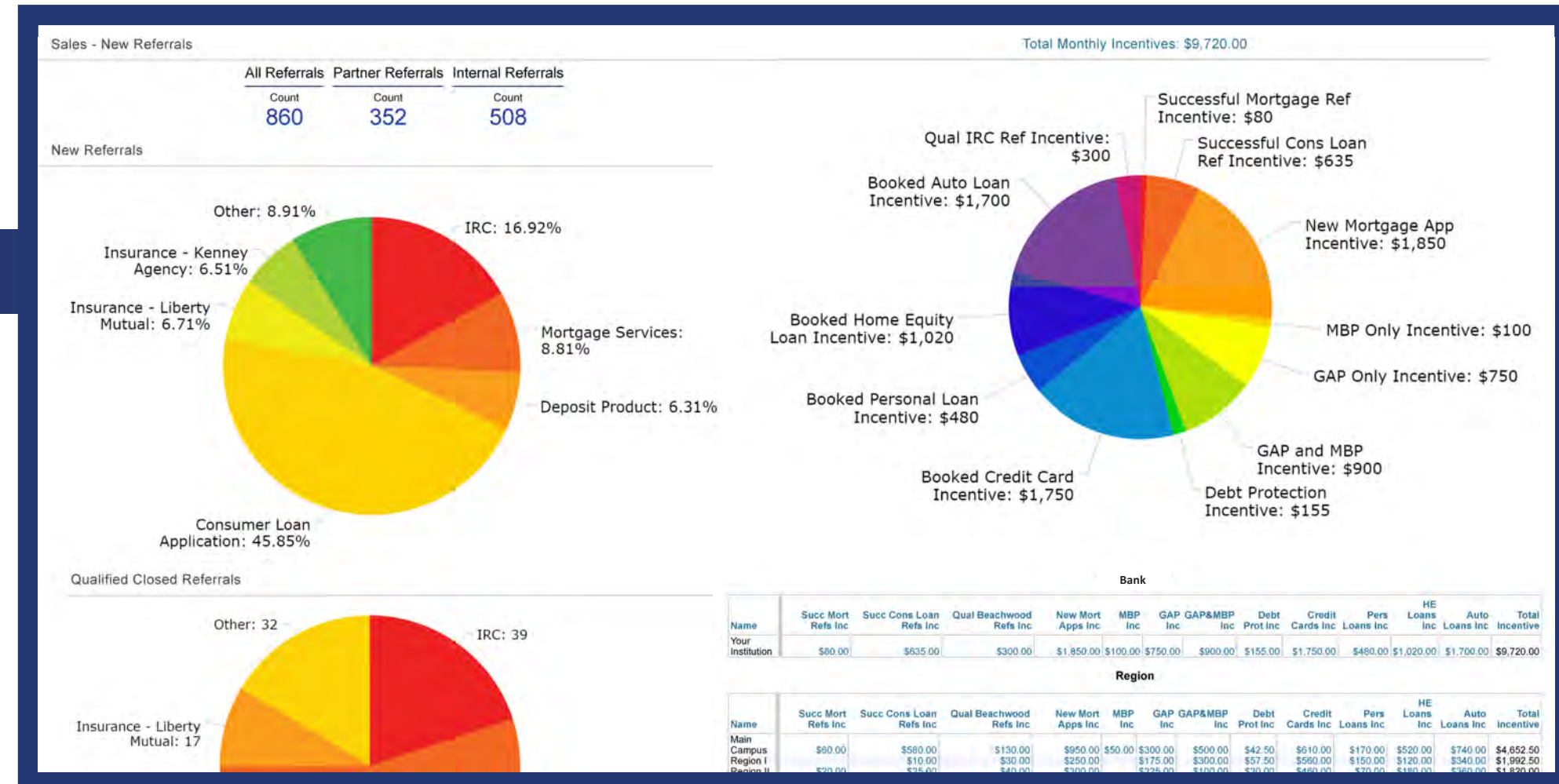
MAXIMIZE CROSS-SELL
Grow your share of wallet with your customers by identifying and acting on sale opportunities.

TRACK SUCCESSFUL REFERRALS
Our system closes the loop by identifying successful referrals and reporting those on employee scorecards, as well as calculating incentives.

DATAVA

THE DATAVA DIFFERENCE

With Datava's Indirect Lending tools, we help you fully streamline your dealer management operations and uncover new opportunities you might have otherwise missed. We increase the performance of your indirect lending team through our goal and incentive system.

From scheduling follow-ups and integration with Google Maps™ to understanding the quality of your loan applications and which dealerships are the most profitable, we simplify the process from start to finish.

DEALER MANAGEMENT
We help you optimize all aspects of your relationship with dealerships, as well as provide tools to facilitate streamlined, quick and thorough communication.

SITE MAPPING
Integration with Google Maps™ allows you to map dealerships and optimize site visits.

PROFITABILITY AND QUALITY
Enjoy a full picture of the quality of the loan applications your dealership partners are sourcing, and understand better which dealerships are the most profitable.

GOALS AND INCENTIVES
Set goals, incentivize and manage your indirect lending team more efficiently with easy-to-understand dashboards.
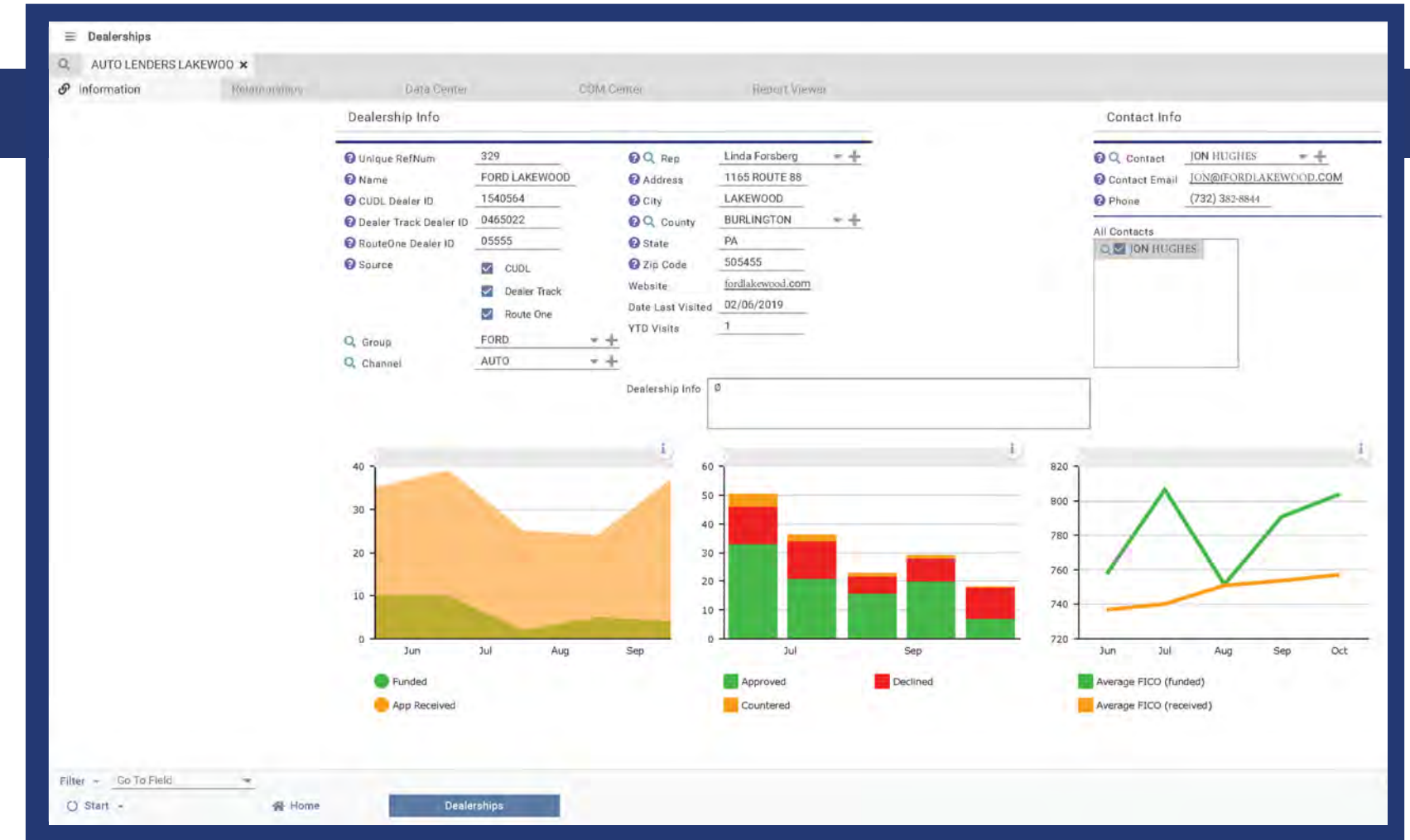
SCHEDULE FOLLOW-UPS
Make scheduling follow-ups with your dealerships an automated and painless process.

DYNAMIC INTEGRATION
Pull in data from CUDL, Dealertrack, RouteOne and other sources. Integrate with your core data to match applications to booked loans.

With our appealing and user-friendly dashboard, enjoy a comprehensive overview of your dealer relationships. Determine the average credit score, the number of received loan applications, and how many were approved, rejected or declined. Help determine the quality of the dealer relationship and identify ways to develop a stronger partnership.

DATAVA

BUSINESS INTELLIGENCE

BUSINESS INTELLIGENCE DASHBOARD

You can't know what works without tracking metrics. Get accurate, actionable information from your data for any area in your organization. Dig deeper with cutting-edge algorithms, data-rich KPI's and clear visualizations that offer your team the ability to tell better stories with better data.

THE DATAVA DIFFERENCE

MAKE SMARTER BUSINESS DECISIONS
Gain a competitive edge by drawing on all available data to identify which actions promote growth, such as ensuring your products meet customers' needs or monitoring trends to predict customer behavior.

TRACK & UNDERSTAND OVER 1000 METRICS
Track any metric over any time scale, whether it's by day, week, month, quarter, or year. Understand those metrics at the region, branch, employee, and customer level.

ACTIONABLE, DEPLOYABLE DASHBOARDS
Build, create, share, and deploy your dashboards to individuals or user roles throughout your entire organization.

MAXIMIZE OPERATIONAL EFFICIENCY
Institute a data-centric focus to assess operational performance. Understand whether resources are being allocated efficiently, or identify exactly what is needed to strengthen your organization and achieve future objectives.

ENHANCE COMMUNICATION, DRILL DOWN, & AUDIT
With any metric, you can drill down and audit the underlying data as well as better communicate by setting up proper role-based access to ensure everyone on your team can access the same data at the same time.

REDUCE RISKS & INCREASE PROFITABILITY
With Datava's BI tools, you'll have a complete picture of your institution to proactively mitigate risks and identify opportunities for growth.
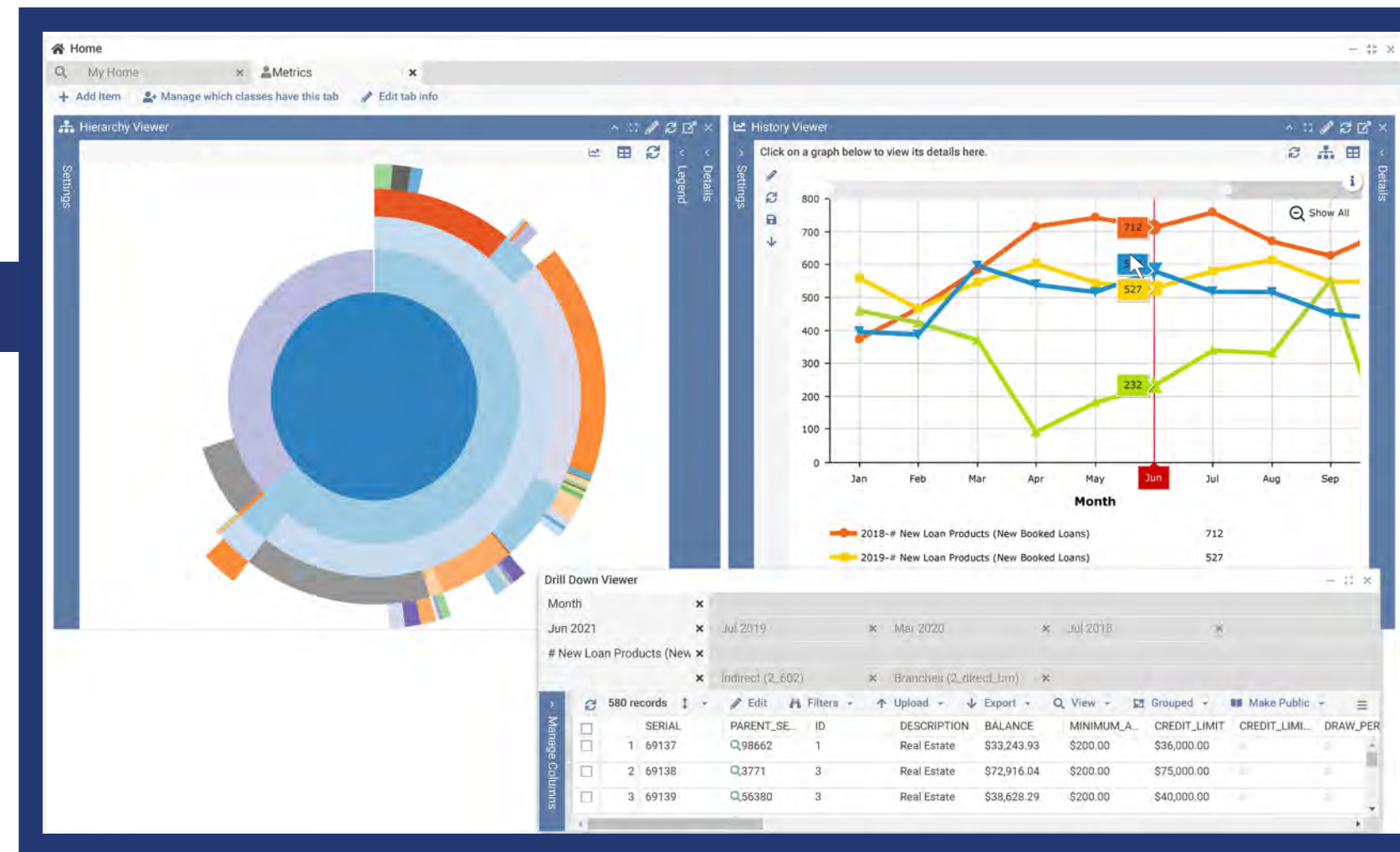
Datava's hierarchy visualization tool allows you to quickly understand all levels of any metric from the bank down to the employee, giving you the flexibility to track macro and micro trends over time and identify if a metric is going up or down.

DATAVA

LOAN APPLICATION PIPELINE

With Datava's Loan Application Pipeline Module, gain a better understanding of your pipeline from application to close to ensure your loan application process is seamless and successful.

Your employees need and your customers want a faster, smoother, and more personalized loan application experience. Datava's automated scheduling reduces time to close, increases funded rates, and improves the quality of your applications. Datava's system automates manual processes and facilitates customer interactions.

THE DATAVA DIFFERENCE

CLEAR PIPELINE PICTURE
Enjoy a clear view of your loan application pipeline, from first outreach to approval.

TRANSFORM YOUR TEAM
Track all aspects of your pipeline and the success of your team. Fully understand how to make your team more efficient, and provide them with the tools they need in one central location.

IMPROVED APPLICANT QUALITY
Improve the quality of the applicants that are coming in, and increase the disbursement rate of your loan products.

CUSTOMER-CENTRIC JOURNEY
Deliver a frictionless customer journey from application to close that drives growth, increases productivity, and deepens customer satisfaction.

PERFECT THE CLOSING PROCESS
Streamline traditional, hybrid, and fully digital closing experiences. Increase your close rates and walk your customers through the loan closing process with minimal effort.

NEVER MISS FOLLOW-UPS
With our automated follow-up scheduling, your team can more easily stay on top of each application and successfully recover inactive loans.

LOAN APPLICATION PIPELINE DASHBOARD

Current Loan App Pipeline Summary
Your Institution
Current Pipeline for Your Institution

Pending: 174
Counter Offer: 37
Denied by DM: 14
Auto Approved: 153
Approved: 62
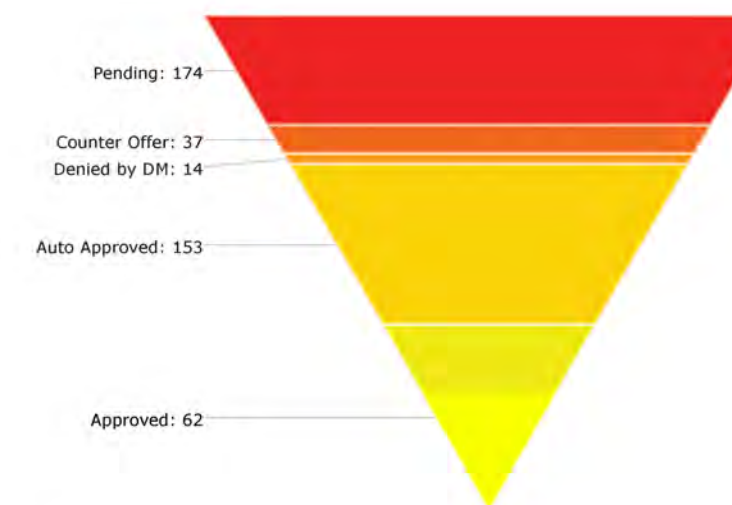
Your Institution Pipeline By Product Type

Product	Pending			Counter Offer			Denied by DM			Auto Approved			Approved			Total	
	Apps	Dollars	Avg Days	Apps	Dollars	Avg Days	Apps	Dollars	Avg Days	Apps	Dollars	Avg Days	Apps	Dollars	Avg Days	Apps	Dollars
All Loans	174 39%	$6,640,452.21 48%	254.8	37 8%	$889,640.64 6%	12.8	14 3%	$332,558.78 2%	35.4	153 34%	$2,605,037.54 18%	158.6	62 14%	$3,311,898.58 24%	86.7	440	$13,679,587.75
Credit Card	16 36%	$39,000.00 20%	441.3	7 15%	$11,500.00 6%	19.1	0%	0%	-	17 38%	$114,150.00 58%	137.9	4 9%	$29,000.00 14%	415.3	44	$193,650.00
Closed End	99 33%	$2,749,953.21 39%	315.0	26 8%	$510,140.64 7%	11.5	14 4%	$332,558.78 4%	35.4	134 44%	$2,383,887.54 34%	156.1	25 8%	$964,898.58 13%	136.4	298	$6,941,438.75
Line of Credit	59 60%	$3,851,499.00 58%	103.3	4 4%	$368,000.00 5%	9.5	0%	0%	-	2 2%	$7,000.00 0%	503.0	33 33%	$2,318,000.00 35%	9.3	98	$6,544,499.00

DATAVA

Datava's outbound prospecting tool unleashes your sales team to work effectively and efficiently.

Our solution provides the perfect mixture of advanced analytics, information, and functionality with simple, easy-to-use dashboards, forms, and data. This gives your sales team only the information they need, at the time they need it, in the way they can best use it.

THE DATAVA DIFFERENCE

PROSPECT PROFILING

Grade prospects on likelihood to close, contact value, and more to forecast revenues.

PIPELINE MANAGEMENT

Use customized dispositions and pipeline reporting to determine the right flow of each prospect.

SCHEDULING

Automate follow-up scheduling, sync calendars, and view tasks to ensure nothing falls through the cracks.

AUTOMATED NURTURING

Warm leads with integration to outside marketing automation platforms, or use Datava's internal nurturer.

MANAGER DASHBOARDS

Easily see how each employee is performing in every key area, and directly interact to make sure you always know what's going on.

MAPPING

View the location of all of your prospects, with customized icons to indicate their disposition to help you plan out visits that will be most effective.
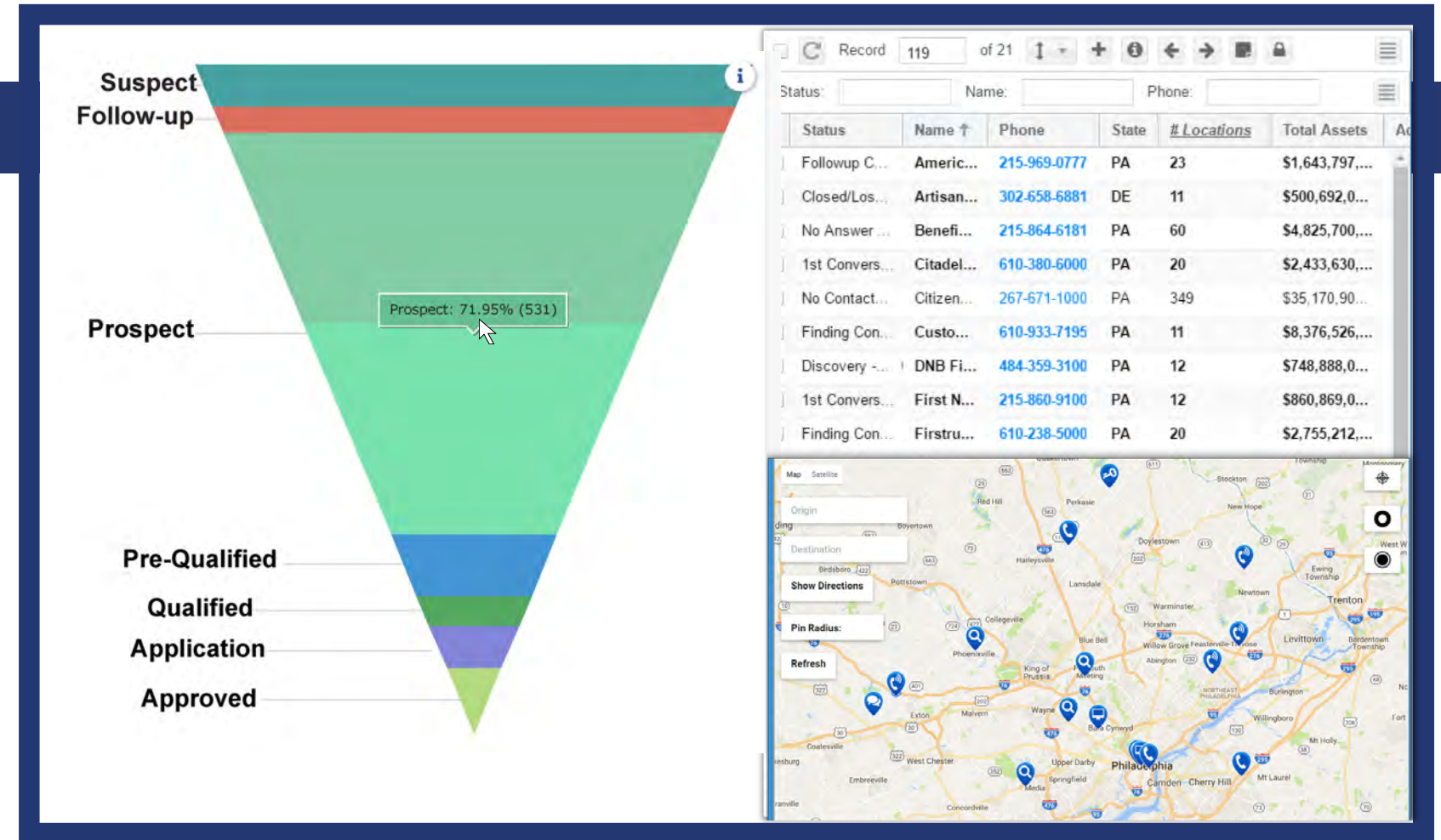
With configurable status' and follow-up cadences, outperform and transform your prospecting framework with our pipeline management tools. Schedule and track calls, plan visits, to your top prospects with our mapping feature.

DATAVA

THE DATAVA DIFFERENCE

Datava can provide you with the highest level of predictive analytics tools to help you answer the questions you need to know.

Improve your business processes, get the insight you need to make the right decisions for your business. Make your bank the best it can be tomorrow by utilizing the valuable information about yesterday.

SMART NEXT BEST PRODUCTS
Incorporate customer account behaviors, demographic information, time of year, customer specific information and more to dynamically identify what is the next most useful product to offer the customer.

ROOT CAUSE ANALYSIS
Uncover root causes to lost productivity, lost sales opportunities, and other process inefficiencies that are costing the bank money.

IDENTIFY KEY PERFORMANCE INDICATORS
Learn which employee behaviors are key in moving the needle with your customers. Improve sales, customer satisfaction and your banks standards.

PROFITABILITY MODELING
Estimate profitability of locations, products, employees and customers using our profitability modeler.

RESOURCE PLANNING
Schedule staffing based on historical sales volumes, weather predictions, and more. This eases scheduling burden on management, reduces over-staffed locations and improves customer experience through reduced wait times.

AUTOMATED ANALYTICS UPDATES
At regular intervals, have your analytics updated to identify changes in the market, your bank or the next area that requires your attention.
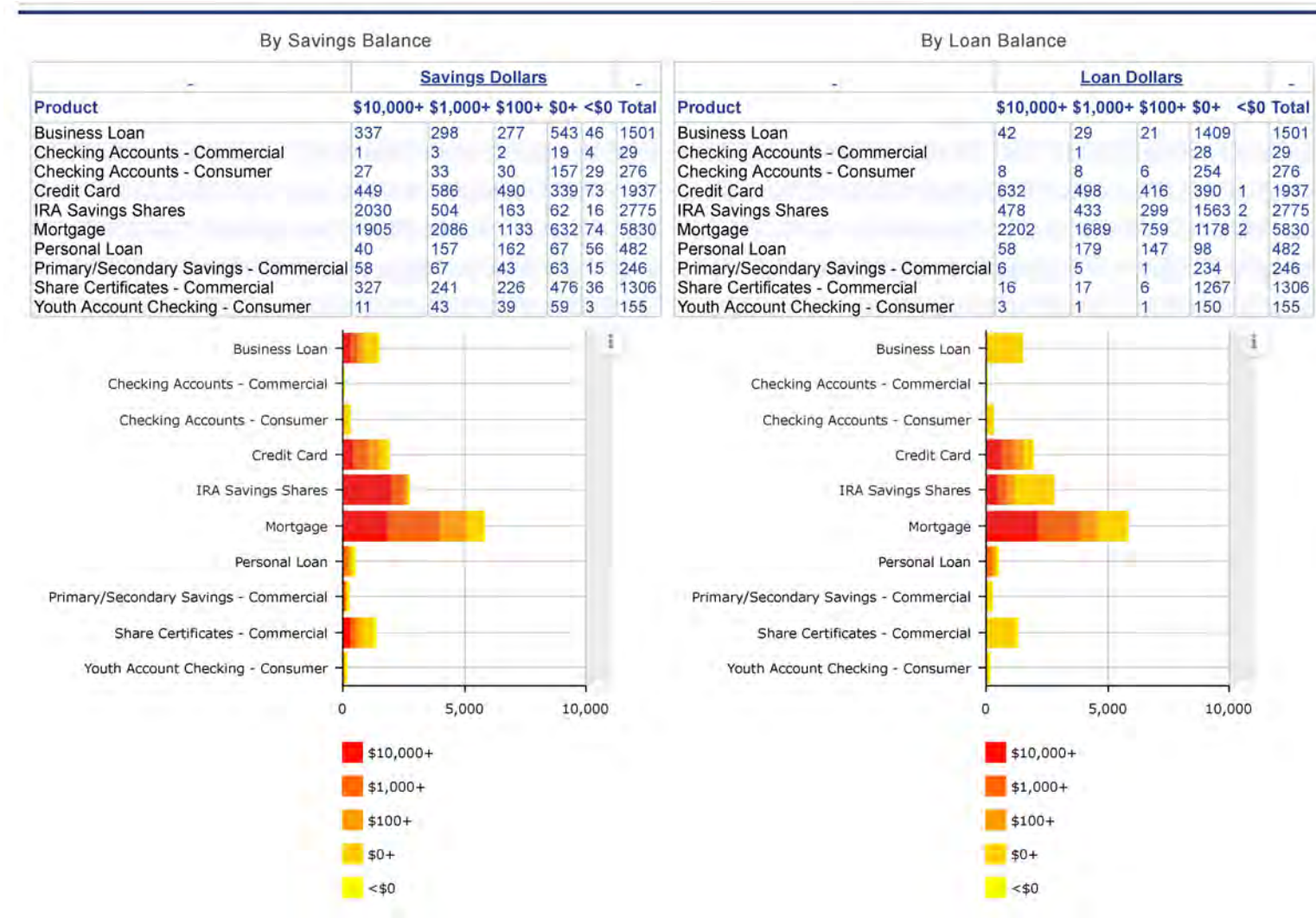
Our robust statistics engine combined with our reporting functionality means you can determine everything from the confidence intervals of your models, to the increased amount of dollars that can be brought in through a change in coaching of your employees.

By Savings Balance

Product	$10,000+	$1,000+	$100+	$0+	<$0	Total
Business Loan	337	298	277	543	46	1501
Checking Accounts - Commercial	1	3	2	19	4	29
Checking Accounts - Consumer	27	33	30	157	29	276
Credit Card	449	586	490	339	73	1937
IRA Savings Shares	2030	504	163	62	16	2775
Mortgage	1905	2086	1133	632	74	5830
Personal Loan	40	157	162	67	56	482
Primary/Secondary Savings - Commercial	58	67	43	63	15	246
Share Certificates - Commercial	327	241	226	476	36	1306
Youth Account Checking - Consumer	11	43	39	59	3	155

By Loan Balance

Product	$10,000+	$1,000+	$100+	$0+	<$0	Total
Business Loan	42	29	21		1409	1501
Checking Accounts - Commercial		1		28		29
Checking Accounts - Consumer	8	8	6	254		276
Credit Card	632	498	416	390	1	1937
IRA Savings Shares	478	433	299	1563	2	2775
Mortgage	2202	1689	759	1178	2	5830
Personal Loan	58	179	147	98		482
Primary/Secondary Savings - Commercial	6	5	1	234		246
Share Certificates - Commercial	16	17	6	1267		1306
Youth Account Checking - Consumer	3	1	1	150		155

Legend: $10,000+, $1,000+, $100+, $0+, <$0

DATAVA

Why take chances with at-risk customers and compliance issues? Our closed loop Enterprise Feedback Manager keeps managers and employees on top of each customer issue from initiation to resolution.

Involve the right departments at the right time, and monitor the progress of each critical customer issue. Best of all, the system will provide easy access to compliance audit reports and performance dashboards.

THE DATAVA DIFFERENCE

✔ **AUDIT REPORTING**
Reduce regulatory headaches with simple, streamlined compliance audit preparation.

REAL-TIME DASHBOARDS
Customizable, real-time dashboards provide you the oversight necessary to identify at-risk compliance issues and the current stage of resolution.

🔍 **ROOT CAUSE ANALYSIS**
Identify the root causes behind customer complaints and regulatory issues.

📅 **FOLLOW-UP SCHEDULING AND ALERTS**
Never drop the ball, with automated follow-up scheduling and alerts.

💬 **ISSUE ESCALATION AND COLLABORATION**
Easily loop-in other employees and collaboratively manage problems to resolution.

📱 **MOBILE FRIENDLY**
Employees can work on issues anywhere, anytime with mobile case management.

Encourage employee behaviors that most affect customer loyalty and satisfaction.

Eliminate employee behaviors that result in customer and regulatory issues.

DATAVA

LEARNING MANAGEMENT

Datava's online training delivery system makes the goal of product knowledge fluency attainable.

Online, self-paced curriculum delivery combined with automated testing, training updates, and a comprehensive management dashboard keeps you on top of employee progress and allows you to pinpoint deficiencies.

Utilize the platform to train other finite skills such as compliance, policies, procedures, etc.

THE DATAVA DIFFERENCE

ONLINE TRAINING DELIVERY
Deliver and manage product knowledge, compliance policies, and other finite skills online, saving money and increasing effectiveness.

VIDEO FRIENDLY
Improve employee retention through multiple content delivery methods, including video content.

SELF-PACED, SELF-DIRECTED LEARNING
Increase employee product certification levels and retention with self-paced, self-directed, customized knowledge delivery and testing.

DYNAMIC EXAMS
Ensure employees are always up-to-speed with the latest information, with tests that are always changing.

MANAGER AND FRONT-LINE DASHBOARDS
Employees can easily track their overall progress and get automated help. Managers can quickly identify areas that need improvement and push out additional training and testing.

EMPLOYEE CERTIFICATION
Automatically certify employees as they pass exams and require re-certification at regular intervals.

LEARNING MANAGEMENT DASHBOARD

Efficiently monitor and identify employee product knowledge deficiencies. Improve customer retention by ensuring they receive accurate and targeted information from staff.

DATAVA

DATA WAREHOUSE

Experience end-to-end data management and curation as a service with Datava's proprietary method of collecting all data, optimizing its storage, mapping all tables into easily navigable structures, and continuously curating data for easy, actionable analytics. Use our integrated business intelligence tools to quickly deliver analytics, or use our API to query your data using your current analytics provider.

THE DATAVA DIFFERENCE

☁ CLOUD BASED
The cloud allows for receiving diverse data and delivers access across your organization in a controlled way.

🔒 TOP TIER SECURITY
Your data is safe and secure with always-on encryption, data protection against destruction, and IP address and role-based access controls.

⤢ NO INTERNAL MANAGEMENT
Focus on what your bank does best, and let us manage the data for you.

### ⬡ DATA ORGANIZATION & VISUALIZATION
Organize your data in simple tree structures. Create custom views of tables with descriptive names, giving you a visual way to understand complex data.

⚷ USER PERMISSIONS
Choose who can see, modify, export, and upload data to ensure that the data gets to the right person in the right way.

⎇ RELATIONSHIP MAPPING
We map all relationships between the data in the system. Using our online navigation tool, you get single-click viewing of every relationship of a record in the system.
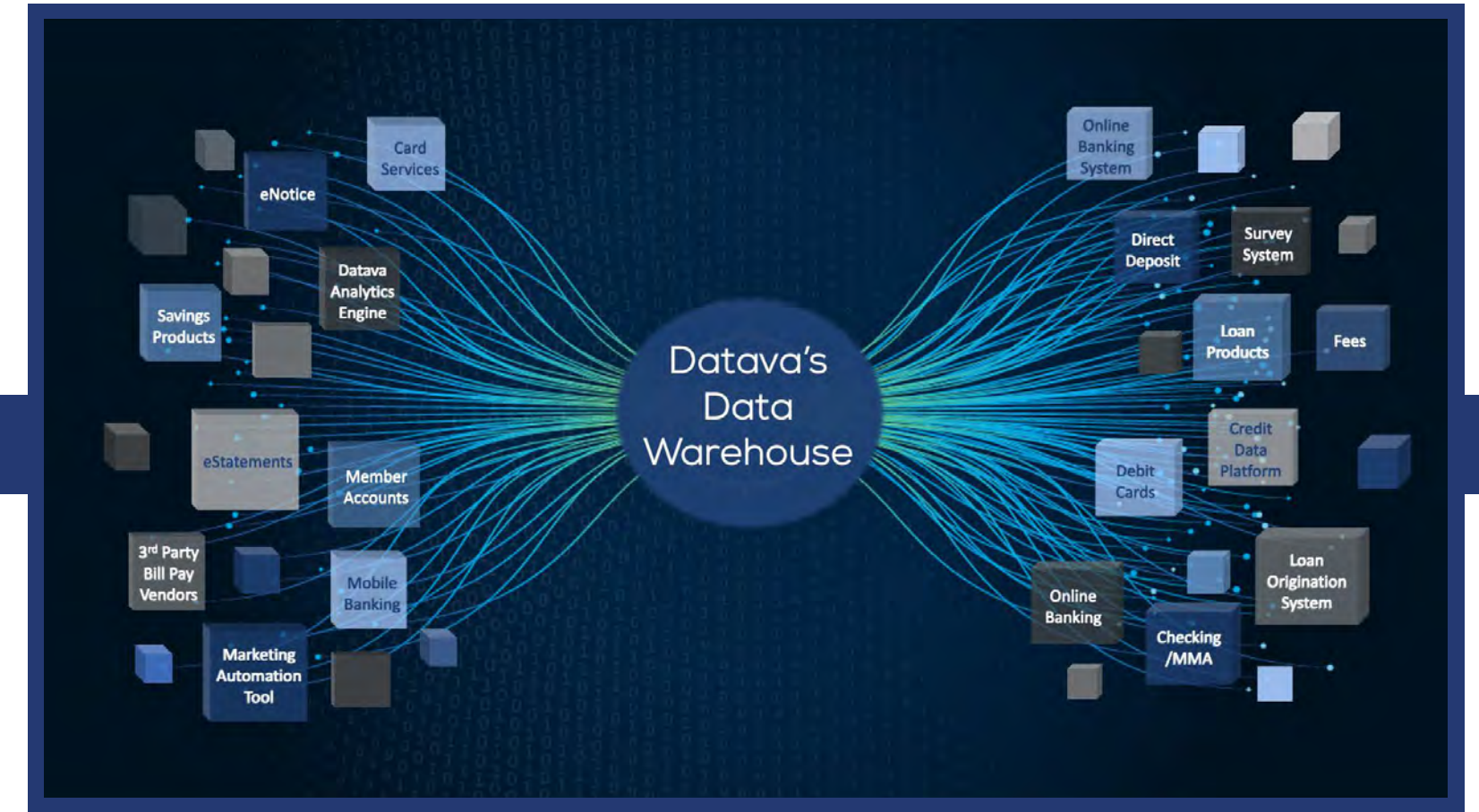
With customers' data often disbursed across many different systems, our data warehouse is able to gather and fully curate that information. We provide you with a full picture of all your customers' accounts and a true 360° view of your customer. No other data fabric, management, aggregation, or analytics engine out there has the power to accomplish what Datava can for your bank.

DATAVA

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RELATIONSHIP MANAGER	GOALS AND INCENTIVE TRACKING	REFERRAL MANAGEMENT	DATA WAREHOUSE
ONBOARDING MANAGER	CAMPAIGN SUCCESS MANAGEMENT	BUSINESS INTELLIGENCE	AND MORE
INDIRECT LENDING	LOAN APPLICATION PIPELINE	OUTBOUND PROSPECTING	
PREDICTIVE ANALYTICS	PROBLEM RESOLUTION/COMPLIANCE	LEARNING MANAGEMENT	