INNOVATION SERIES
WINNER
INNOVATIONS IN MEMBER ANALYTICS
— 2024 —
CREDITUNIONS.COM

YOUR END-TO-END

DATAVA

DATA ACTIVATION PLATFORM

Unlock billion-dollar growth by managing your Credit Union's entire data journey – from collection to activation – with a single, powerful platform

FEATURED CLIENTS

INNOVATION SERIES WINNER — INNOVATIONS IN MEMBER ANALYTICS — 2024 — CREDITUNIONS.COM

WINNER — 2024 Summit | CULytics — 2024 Partner of The Year

American Heritage Credit Union
Launch Credit Union
North Shore Federal Credit Union
TruMark Financial Credit Union
Wasatch Peak Credit Union
WeStreet Credit Union
Interior Federal Credit Union
First Heritage Realty Alliance
Sun East Federal Credit Union
LGE Community Credit Union
Southland Credit Union
Sooper credit union
UnitedOne Credit Union
Meridian Trust Federal Credit Union
People First
nih Federal Credit Union
Great River Federal Credit Union
True North Federal Credit Union
Leaders Credit Union
PointWest Credit Union
Merrimack Valley Credit Union

TESTIMONIALS

100% Client Retention

★★★★★

"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

★★★★★

"We value having one partner and one platform to manage, seamless integrations, secure technology, technology that grows with us, and increases employee performance and engagement"

Angie Crosby
VP, PMO
Launch HCredit Union

DATAVA

SUCCESS STORIES

datava.com/case-studies

TruMark Financial Credit Union

11,000 MORTGAGE REFERRALS
generated
$167 MILLION
in new mortgages

Sun East Federal Credit Union

94 DAYS OF STAFF HOURS SAVED PER YEAR
through automating Goals and Incentives

LAUNCH CREDIT UNION

60 DAYS OF VP & BRANCH MANAGER STAFF HOURS SAVED PER YEAR
through automating Goals and Incentives

People First

MEMBER ONBOARDING
produced
180 LOANS AND 130 ADDITIONAL DEPOSIT PRODUCTS
in the first 6 months

FEATURED SUCCESS STORY

American Heritage CREDIT UNION

DATAVA'S COMPLETE SYSTEM AIDED IN $1 BILLION GROWTH IN JUST 2 YEARS

+25%
INCREASE IN HOUSEHOLD CROSS-SELL

200%
INCREASE IN NEW INDIRECT APPROVED LOANS

29%
INCREASE IN LOANS AND DEPOSITS FROM SEGS

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 credit union 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 credit union'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.

DATAVA

DATA ACTIVATION PLATFORM

Credit Unions possess more data about their members than Amazon, but this data is often fragmented and inaccessible. Datava's Data Activation Platform enables credit unions to become truly data driven, to better serve their members 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 member 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 member 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 credit union.

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 credit union.

OBTAIN METRICS FROM YOUR DATA

Identify trends, patterns, and performance indicators, to facilitate data-backed decisions, optimize processes, and drive growth.

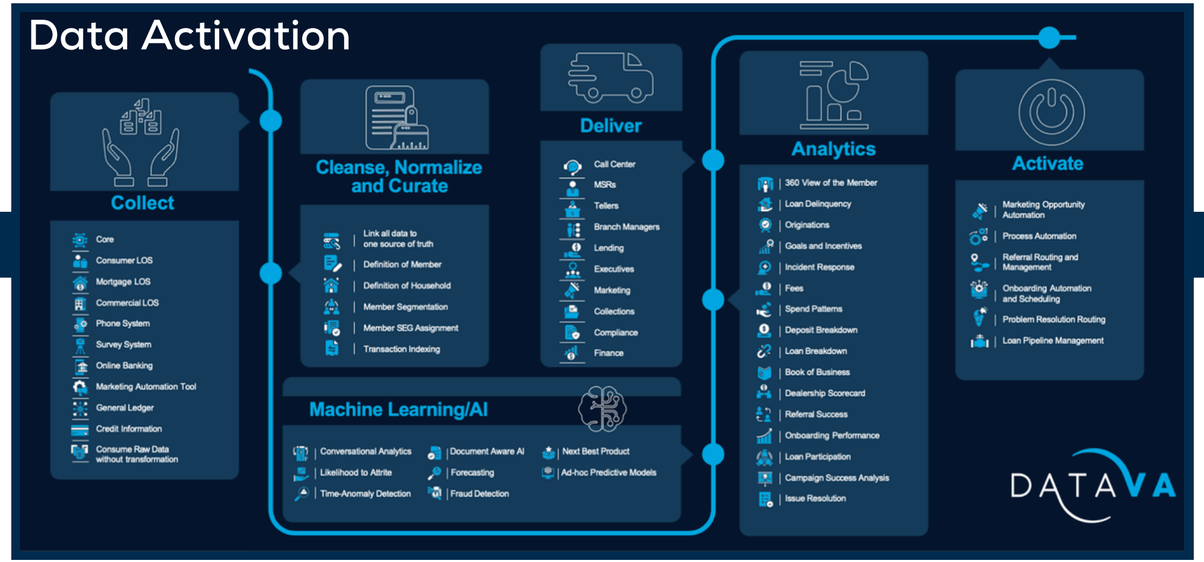
ACTIVATE YOUR DATA IN WORKFLOWS

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.

END-TO-END SOLUTION



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 members alike and drive informed decision making, improved member experiences and increased productivity. With Activated Data, crucial, AI driven insights & directives are delivered to the right staff member at the right time so they can serve members faster & better.

RELATIONSHIP MANAGER

RELATIONSHIP DASHBOARD

THE DATAVA DIFFERENCE

Go beyond simply reacting to interacting with your members with Datava's Relationship Manager. Get a complete understanding of every member and how to follow-up, when to follow-up, and how your credit union 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 members have, how often they are using them, and what the balances of the accounts are.

MEMBER BIO

Track important information about members 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 member 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 members currently are projected to impact the credit union and see how that number can be improved through behavioral changes, account restructuring and more.

NEXT BEST PRODUCT PROMPTS

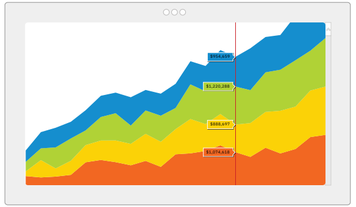
Easily identify which products would be of use to your members and facilitate your employees communicating those opportunities to them.

TRACK FINANCIAL GOALS

Transform your relationship with your members 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 member. See what their balances are, the health of their account, which products would most benefit them, and how you can best serve them.

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 member'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.

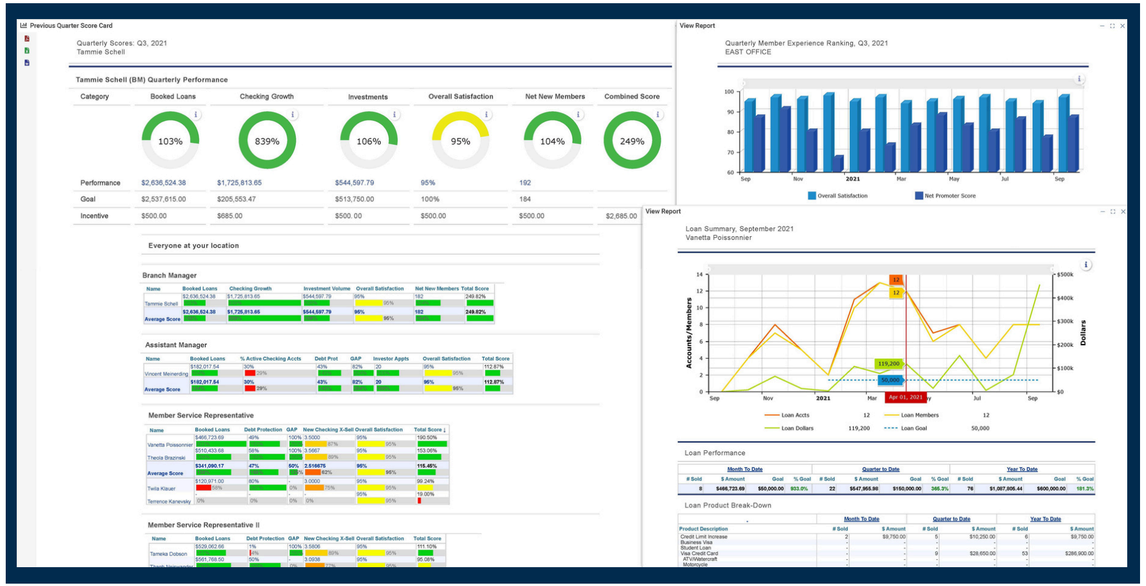
CUSTOMIZED INCENTIVE PROGRAMS

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 member'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 members' needs, offer products, and deliver service solutions. Reward high-performing employees and coach underachievers.

DATAVA

ONBOARDING MANAGER

ONBOARDING DASHBOARD

THE DATAVA DIFFERENCE

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

Employees are provided with a daily list of onboarding action items. Member 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 member 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 member management.

CLOSED ACCOUNT ALERTS

Reduce lost members with closed account alerts. These alerts allow employees to proactively reach out to members before the relationship is lost.

DATA SYNCING

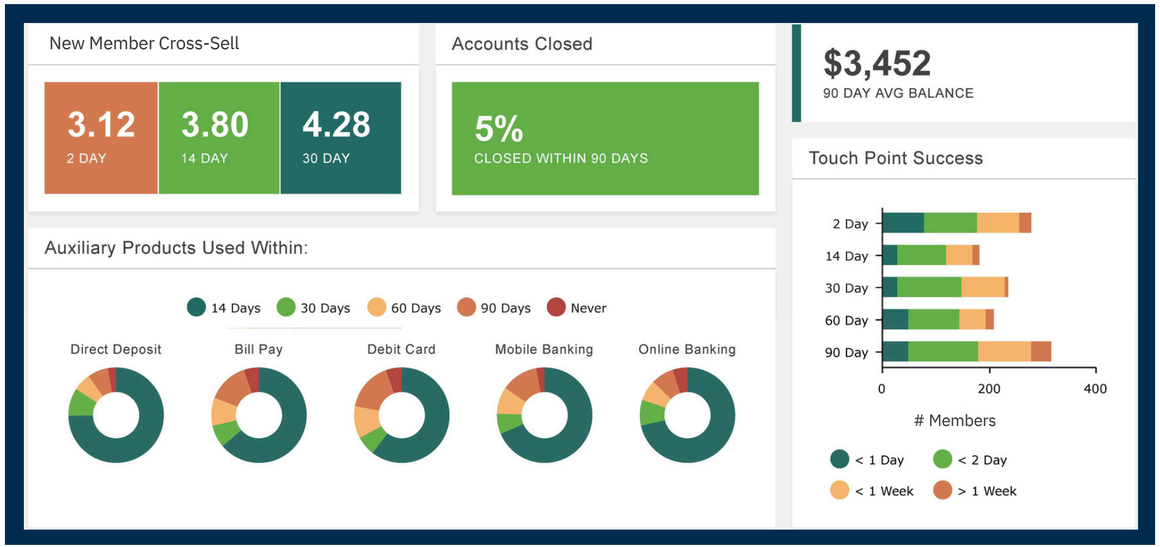
With member profile syncing, analyze when new members are opening additional accounts, using your product, and/or other major retention events.

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 member.

NEXT BEST PRODUCT PROMPTS

Anticipate member 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 member onboarding, increasing the likelihood that members adopt you as their primary institution.

CAMPAIGN SUCCESS MANAGEMENT

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 ME THODS

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 MEMBERS

Use deep-dive analytics to determine which type of marketing works best for which segment of member. Segment by demographics, member 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 member reach.

ANALYZE MEMBER LOY A LT Y

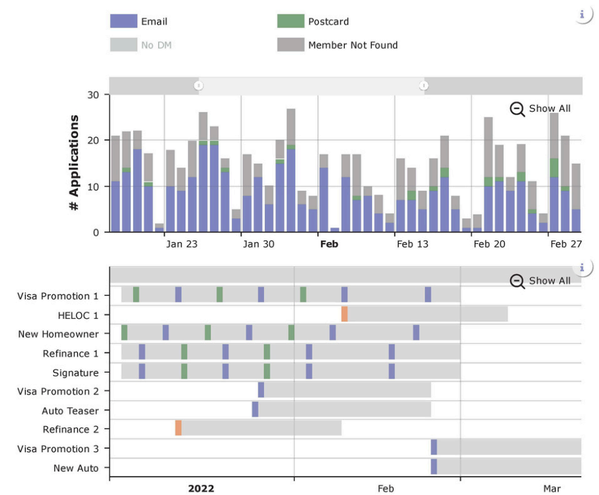
Determine if marketing is having an effect on member churn, net promoter and more.

CAMPAIGN SUMMARY REPORT

Campaign Summary (All Campaigns), Q1, 2022

-	Email		Post card		No DM		Non-Member		Total	
Product	# 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



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

REFERRAL MANAGEMENT

With Datava's sophisticated Referral Management system, 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 members' needs. Utilize detailed reporting and analytics to better understand referral opportunities or incentivize your employees.

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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.

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.

ACQUIRE NEW MEMBERS

Enable your frontline staff to refer products and services to non-members, linking opened accounts to the referrals.

MAXIMIZE CROSS-SELL

Grow your share of wallet with your members by identifying and acting on sale opportunities.

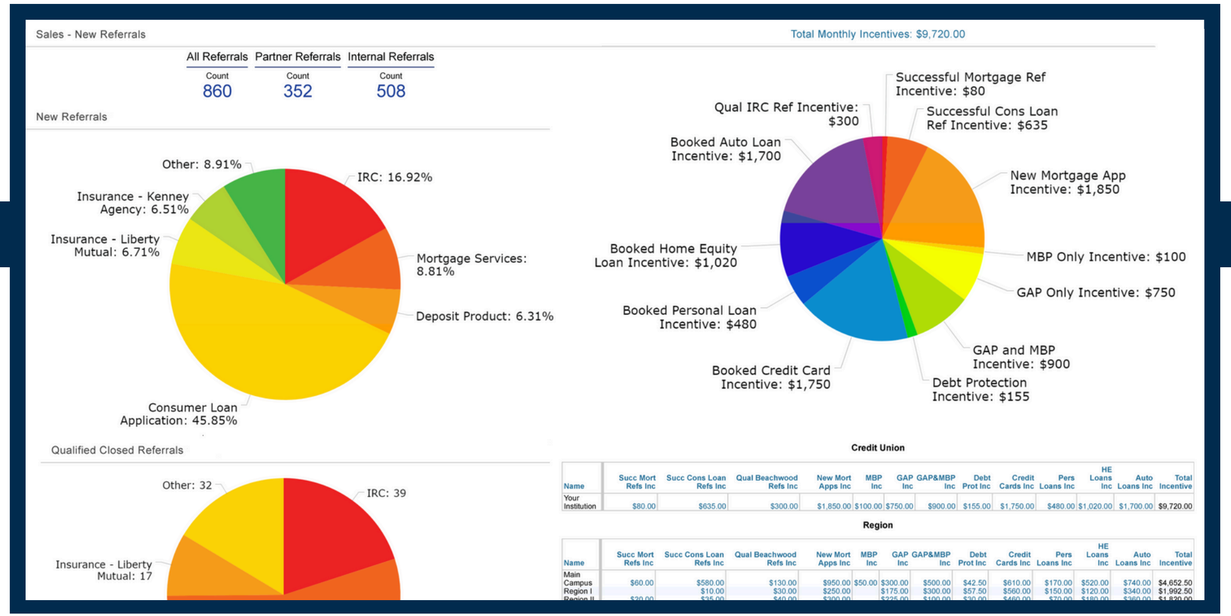
EXPAND MEMBER RELATIONSHIPS

Build trust and deepen relationships with your members by recommending beneficial products that correlate with their actual needs and life events.

TRACK SUCCESSFUL REFERRALS

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

REFERRAL MANAGEMENT INTERFACE



Name	Succ Mort Refs Inc	Succ Cons Loan Refs Inc	Qual Beachwood Refs Inc	New Mort Apps Inc	MBP Inc	GAP Inc	GAP&MBP Inc	Debt Prot Inc	Credit Cards Inc	Pers Loans Inc	HE Loans Inc	Auto Loans Inc	Total Incentive
Your Institution	$80.00	$635.00	$300.00	$1,850.00	$100.00	$750.00	$900.00	$155.00	$1,750.00	$480.00	$1,020.00	$1,700.00	$9,720.00

Name	Succ Mort Refs Inc	Succ Cons Loan Refs Inc	Qual Beachwood Refs Inc	New Mort Apps Inc	MBP Inc	GAP Inc	GAP&MBP Inc	Debt Prot Inc	Credit Cards Inc	Pers Loans Inc	HE Loans Inc	Auto Loans Inc	Total Incentive
Main Campus	$60.00	$580.00	$130.00	$950.00	$50.00	$300.00	$500.00	$42.50	$610.00	$170.00	$520.00	$740.00	$4,652.50
Region I		$10.00	$30.00	$250.00		$175.00	$300.00	$57.50	$560.00	$150.00	$120.00	$340.00	$1,992.50
Region II	$20.00	$35.00	$40.00	$300.00		$225.00	$100.00	$20.00	$480.00	$20.00	$180.00	$360.00	$1,820.00

INDIRECT LENDING

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 facilitate the increased 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.

GOALS AND INCENTIVES

Set goals, incentivize and manage your indirect lending team more efficiently with easy-to-understand dashboards.

SITE MAPPING

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

SCHEDULE FOLLOW-UPS

Make scheduling follow-ups with your dealerships an automated and painless process.

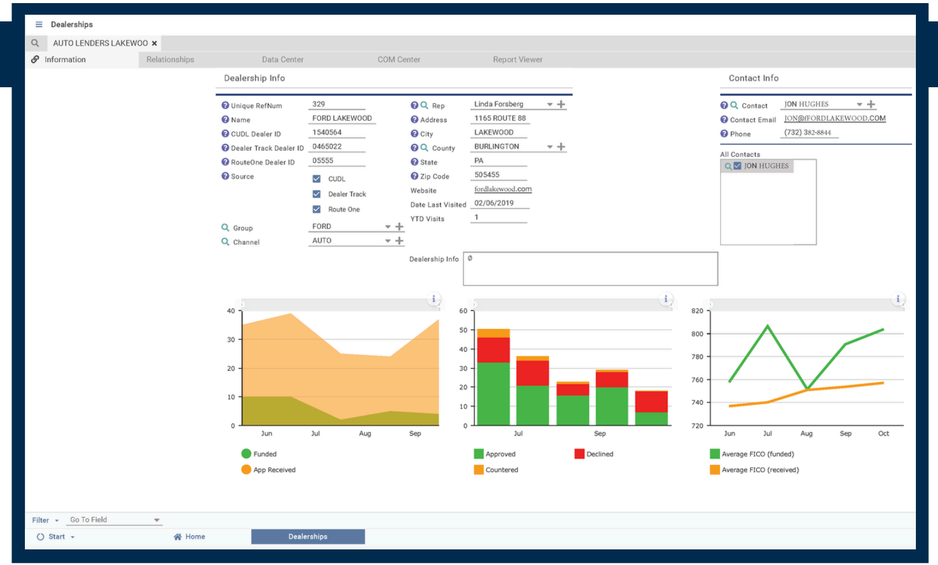
PROFITABILITY AND QUALITY

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.

DYNAMIC INTEGRATION

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

INDIRECT LENDING DASHBOARD



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.

BUSINESS INTELLIGENCE

You can't know what works without tracking metrics. Get accurate, actionable information for your pipeline, sales, referrals, goals and any other area in your organization. Dig-in even deeper with our predictive analytics engine, where cutting-edge algorithms will identify next-best-products, at-risk accounts, KPIs and more.

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THE DATAVA DIFFERENCE

EMPLOYEE LEVEL REPORTS

Research shows that when you show employees how they're doing, they take ownership of their performance.

REFERRAL SUCCESS RATIOS

Measure, coach, monitor and improve inter and intradepartmental referral effectiveness.

FULL DATA WAREHOUSING

Easily get a complete picture of your institution with Datava's simple, clean data warehouse, where you can set permissions to view, edit, export and build reports from data.

ACTIONABLE DASHBOARDS

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

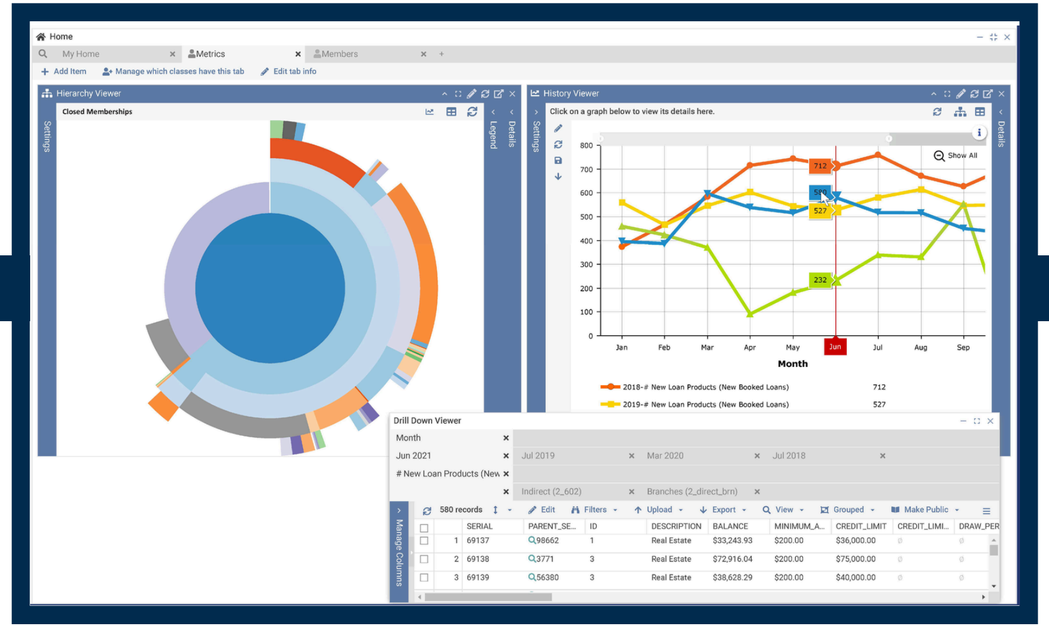
CUSTOMIZED GOALS AND INCENTIVES

Reduce managerial, HR & IT burden by automating any goals/incentives throughout the organization.

DRILL DOWN AND CROSS TAB

Quickly analyze ANY sales or referral metric. Identify customer's purchase behaviors, segment by demographic, analyze new markets, view cross-sell, profitability, etc.

BUSINESS INTELLIGENCE DASHBOARD



Increase revenue efficiently and effectively with advanced targeted KPIs in simple, clean dashbaord reports. Determine which employees effectively identify customers' needs, offer products, and deliver service solutions. Reward high-performing employees and coach underachievers.

DATAVA

LOAN APPLICATION PIPELINE

Ensure your loan application process is frictionless and successful with Datava's Loan Application Pipeline Platform. Gain a better understanding of your pipeline from application to close.

Facilitate unique member journeys that ensure the loan process is faster, smoother and deepens the member relationship. Improve the quality of your applicants and increase your disbursement rate. Leverage the tools to help your team succeed and automate follow ups on inactive loans.

THE DATAVA DIFFERENCE

CLEAR PIPELINE PICTURE

Leverage management tools and enjoy a clear view of your loan application pipeline, from first outreach to approval.

MEMBER-CENTRIC JOURNEY

Deliver seamless member journeys from application to close that drive growth, increase productivity and deepen member satisfaction.

TRANSFORM YOUR TEAM

Track all aspects of your pipeline and the success of your team. Understand fully how to make your team more efficient and provide them with the tools they need in one, central location.

PERFECT THE CLOSING PROCESS

Streamline traditional, hybrid and fully digital closing experiences. Increase your close rates and walk your members through the loan closing process with minimal effort.

IMPROVED APPLICANT QUALITY

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

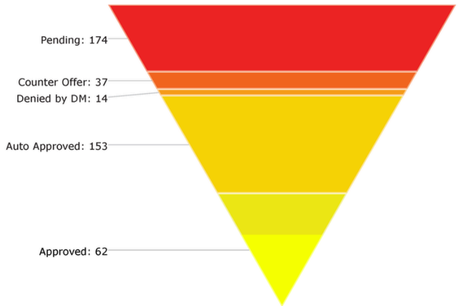
NEVER MISS FOLLOW UPS

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



Your Institution Pipeline By Product Type

	Pending			Counter Offer			Denied by DM			Auto Approved			Approved			Total	
Product	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%	$2,505,037.54 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 5%	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

OUTBOUND PROSPECTING

OUTBOUND PROSPECTING TOOLS

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 to give 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

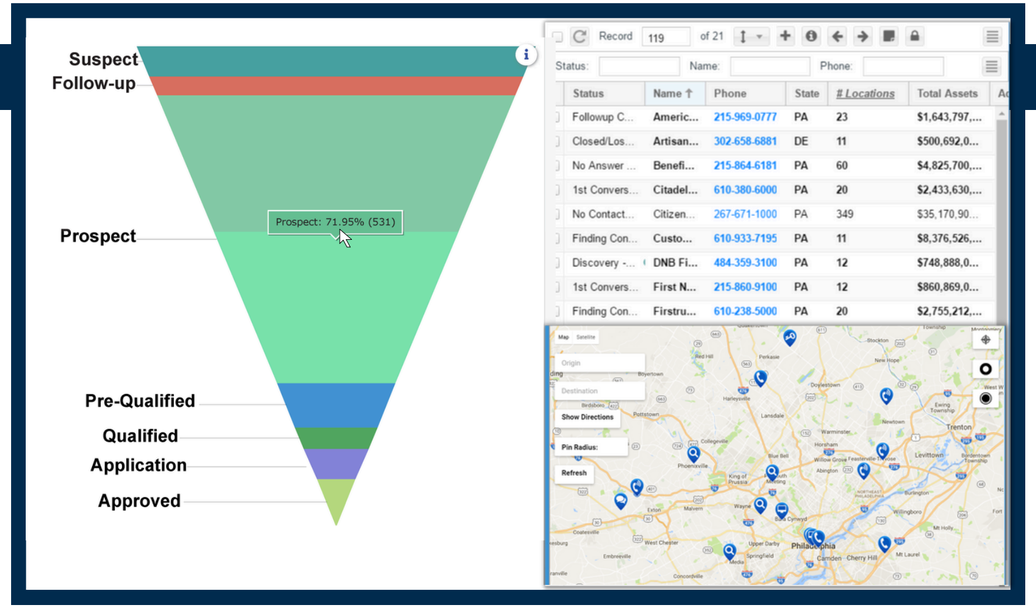
Warm leads with integration to outside marketing automation platforms, or use Datava's internal nurturer.

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.



Outperform and transform your prospecting framework with our pipeline management tools. Plan visits to your top prospects with our mapping feature. Filter, sort, and coordinate drive-times between locations with icons that clearly indicate the prospect's disposition.

SEG MANAGEMENT

Watch your prospecting pipeline grow exponentially when you use Datava's Select Employer Group (SEG) Management Platform. Gain a better understanding of those relationships to help you improve and optimize them.

From comprehensive pipeline management and tracking campaign effectiveness to determining your SEGs' penetration, you can understand not only what is happening, but also ways to improve and optimize your existing relationships and identify new SEG opportunities.

THE DATAVA DIFFERENCE

PIPELINE MANAGEMENT
Management of your pipeline, from the identification of new SEGs to getting them approved by the board.

DATA DRIVEN
Understand the actual deposit and loan dollars sourced by each SEG.

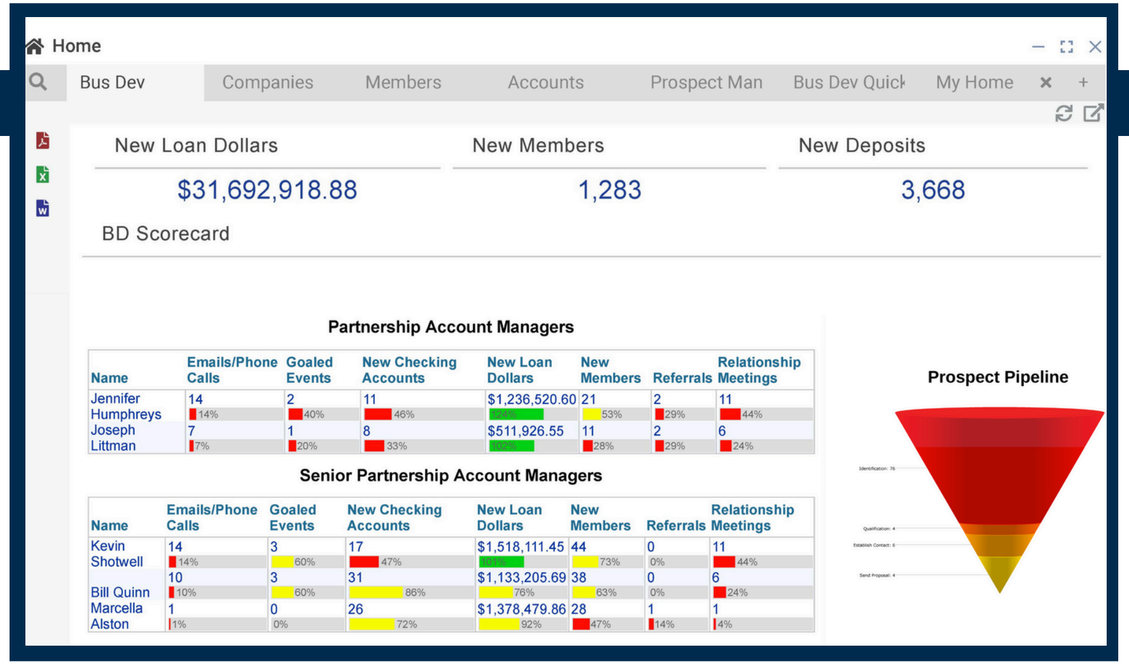
EFFECTIVENESS TRACKING
Schedule and track the effectiveness of campaigns, events, sponsorships, donations and more.

GOALS AND INCENTIVES
Offer goals and incentives to your SEG Management team to enhance and increase performance.

SEG PENETRATION
Understand how many new members sign up from each SEG and identify which partnerships are the most beneficial.

MAP SEGs
Integration with Google Maps™ allows you to map out your SEGs to save time and optimize on-site visits.

SEG MANAGEMENT DASHBOARD



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 credit union the best it can be tomorrow by utilizing the valuable information about yesterday.

SMART NEXT BEST PRODUCTS

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

ROOT CAUSE ANALYSIS

Uncover root causes to lost productivity, lost sales opportunities, and other process inefficiencies that are costing the credit union money.

IDENTIFY KEY PERFORMANCE INDICATORS

Learn which employee behaviors are key in moving the needle with your members. Improve sales, member satisfaction and credit union standards.

PROFITABILITY MODELING

Estimate profitability of locations, products, employees and members using our profitability modeler.

RESOURCE PLANNING

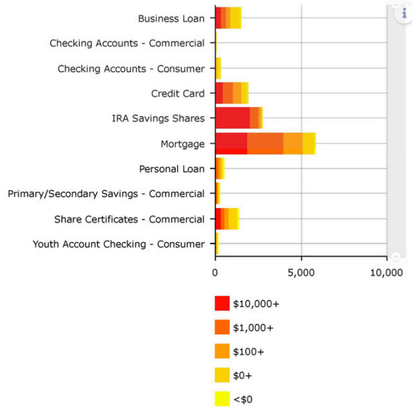
Schedule staffing based on historical sales volumes, weather predictions, and more. This eases scheduling burden on management, reduces over-staffed locations and improves member experience through reduced wait times.

AUTOMATED ANALYTICS UPDATES

At regular intervals, have your analytics updated to identify changes in the market, your credit union or the next area that requires your attention.

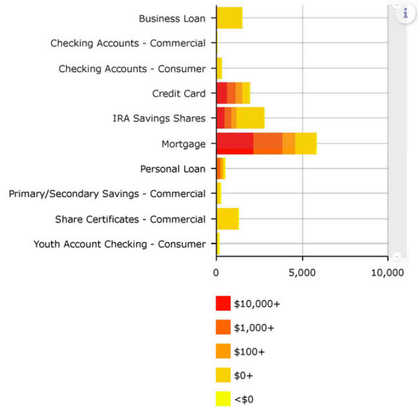
By Savings Balance

-	Savings Dollars					-
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

-	Loan Dollars					-
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



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.

COMPLIANCE & PROBLEM MANAGEMENT

PROBLEM MANAGEMENT DASHBOARD

THE DATAVA DIFFERENCE

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

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

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 member complaints and regulatory issues.

FOLLOW-UP SCHEDULING AND ALERTS

Never drop the ball, with automated follow-up scheduling and alerts.

ISSUE ESCALATION AND COLLABORATION

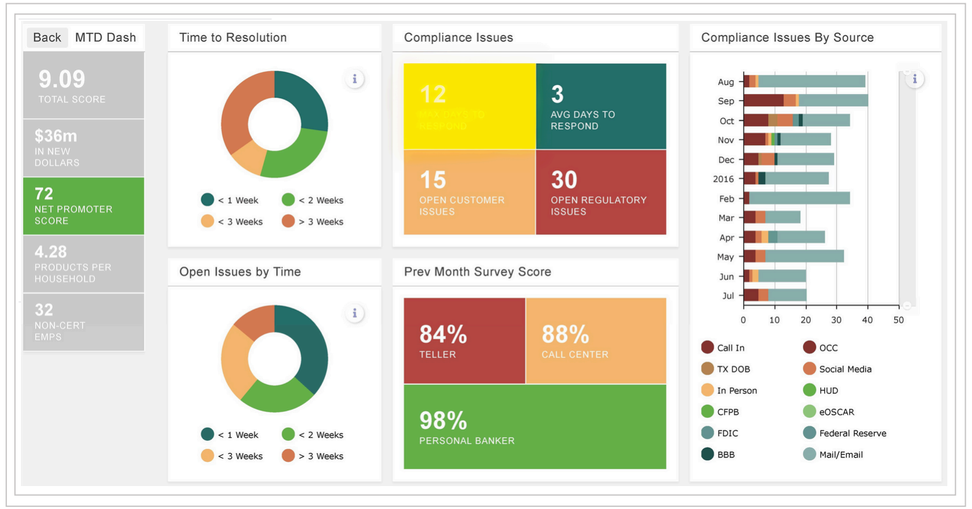
Easily loop-in other employees and collaboratively manage problems to resolution.

MOBILE FRIENDLY

Employees can work on issues anywhere, anytime with mobile case management.

Encourage employee behaviors that most affect member loyalty and satisfaction.

Eliminate employee behaviors that result in member and regulatory issues.



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 member retention by ensuring they receive accurate and targeted information from staff.

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 credit union 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.

DATA WAREHOUSE

With members' 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 members' accounts and a true 360° view of your member. No other data fabric, management, aggregation, or analytics engine out there has the power to accomplish what Datava can for your credit union.

DATAVA

Proven Results

American Heritage Credit Union	People First Federal Credit Union	Sun East Federal Credit Union	TruMark Financial Credit Union	LAUNCH Federal Credit Union
$1B	**180**	**94+ days**	**11,000**	**100+ days**
revenue growth	new loans	manual labor saved	mortgage referrals	manual labor saved

DATAVA

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