

BE DATA DRIVEN



BE MEMBER FOCUSED

Datava enables credit unions to become truly data driven, to better serve their members and to collaborate inside and outside their institution

**New
Module
Release!**



FEATURED CLIENTS

TESTIMONIALS



"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



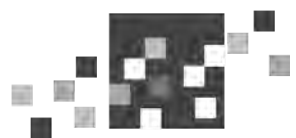
"Datava understands our needs, they understand what it is we're trying to accomplish, and they find the solution. Datava really works well with me and my team."

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



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



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.

5 WAYS WE'RE DIFFERENT SO YOU SUCCEED

*SoftwareAdvice.com CRM survey











DATA ACTIVATION PLATFORM

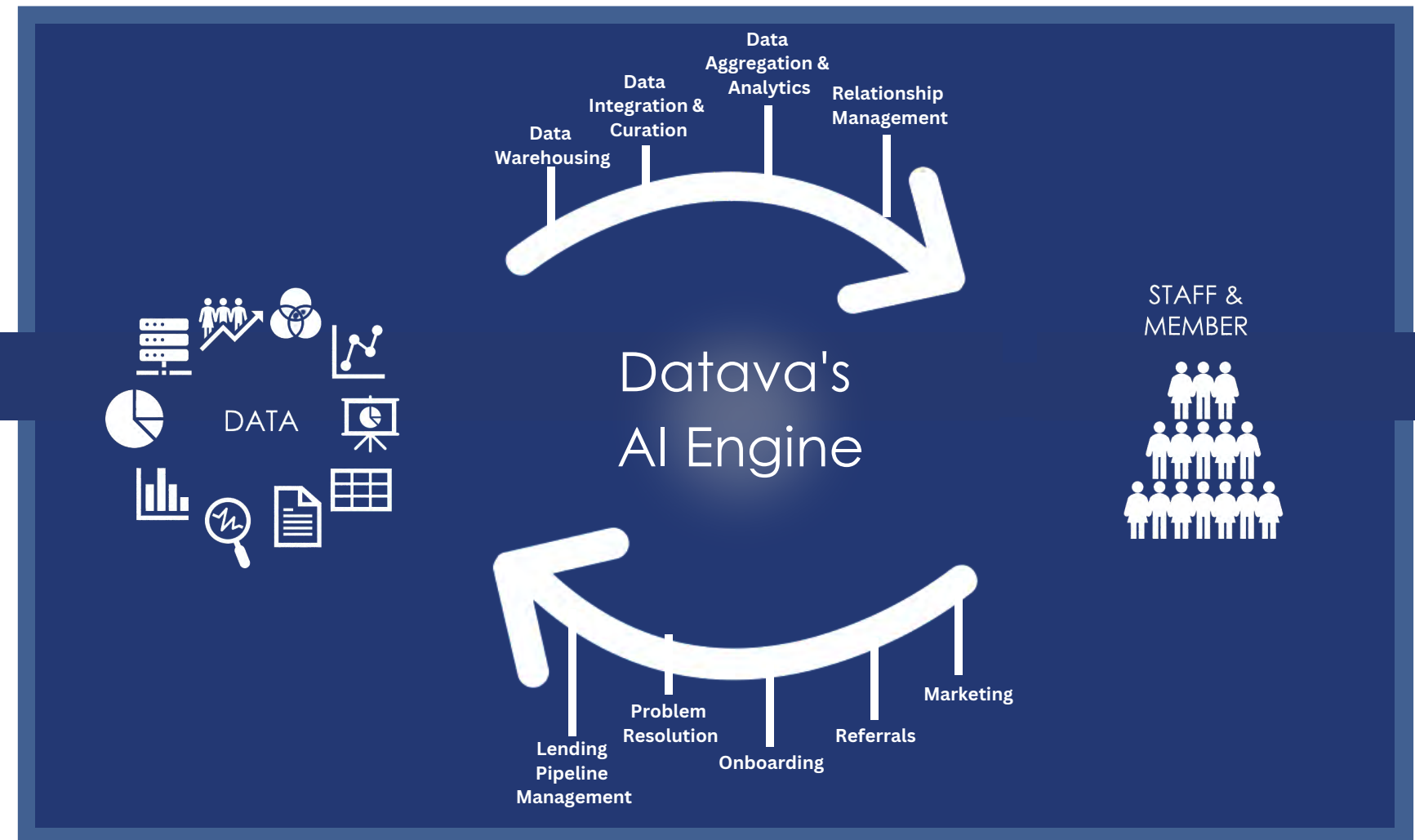
Credit Unions possess more data about their members than Amazon, but this data is often fragmented and inaccessible. Datava's Data Activation Platform enables credit unions to become truly data driven, to better serve their members and to collaborate inside and outside their institution. It is the only 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.

COMPLETE 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.




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.

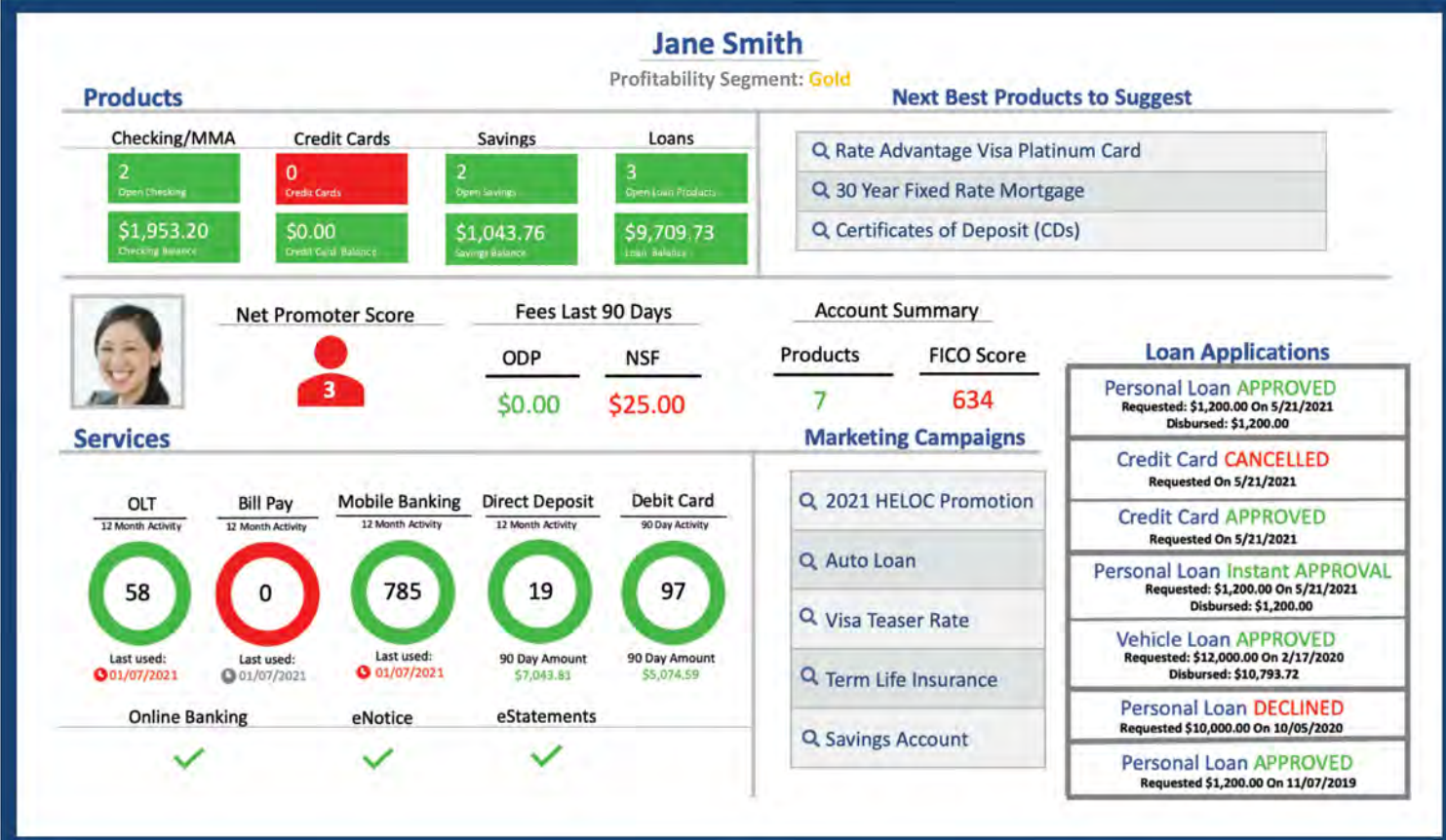
From account balances, to closed account alerts, to problems, you can understand not just what has happened, but how to best help grow that relationship today and in the future.

- 
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.



Jane Smith
Profitability Segment: **Gold**

Products

Checking/MMA	Credit Cards	Savings	Loans
2 Open Checking	0 Credit Cards	2 Open Savings	3 Open Loan Products
\$1,953.20 Checking Balance	\$0.00 Credit Card Balance	\$1,043.76 Savings Balance	\$9,709.73 Loan Balance

Next Best Products to Suggest

- Q Rate Advantage Visa Platinum Card
- Q 30 Year Fixed Rate Mortgage
- Q Certificates of Deposit (CDs)

Services

OLT	Bill Pay	Mobile Banking	Direct Deposit	Debit Card
58 12 Month Activity	0 12 Month Activity	785 12 Month Activity	19 12 Month Activity	97 90 Day Activity
Last used: 01/07/2021	Last used: 01/07/2021	Last used: 01/07/2021	90 Day Amount \$7,043.83	90 Day Amount \$5,074.59

Account Summary

Net Promoter Score	Fees Last 90 Days	Products	FICO Score
3	ODP: \$0.00, NSF: \$25.00	7	634

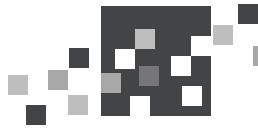
Marketing Campaigns

- Q 2021 HELOC Promotion
- Q Auto Loan
- Q Visa Teaser Rate
- Q Term Life Insurance
- Q Savings Account

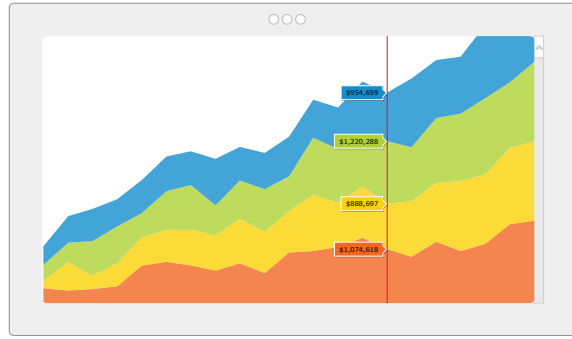
Loan Applications

- Personal Loan **APPROVED**
Requested: \$1,200.00 On 5/21/2021
Disbursed: \$1,200.00
- Credit Card **CANCELLED**
Requested On 5/21/2021
- Credit Card **APPROVED**
Requested On 5/21/2021
- Personal Loan **Instant APPROVAL**
Requested: \$1,200.00 On 5/21/2021
Disbursed: \$1,200.00
- Vehicle Loan **APPROVED**
Requested: \$12,000.00 On 2/17/2020
Disbursed: \$10,793.72
- Personal Loan **DECLINED**
Requested \$10,000.00 On 10/05/2020
- Personal Loan **APPROVED**
Requested \$1,200.00 On 11/07/2019

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.

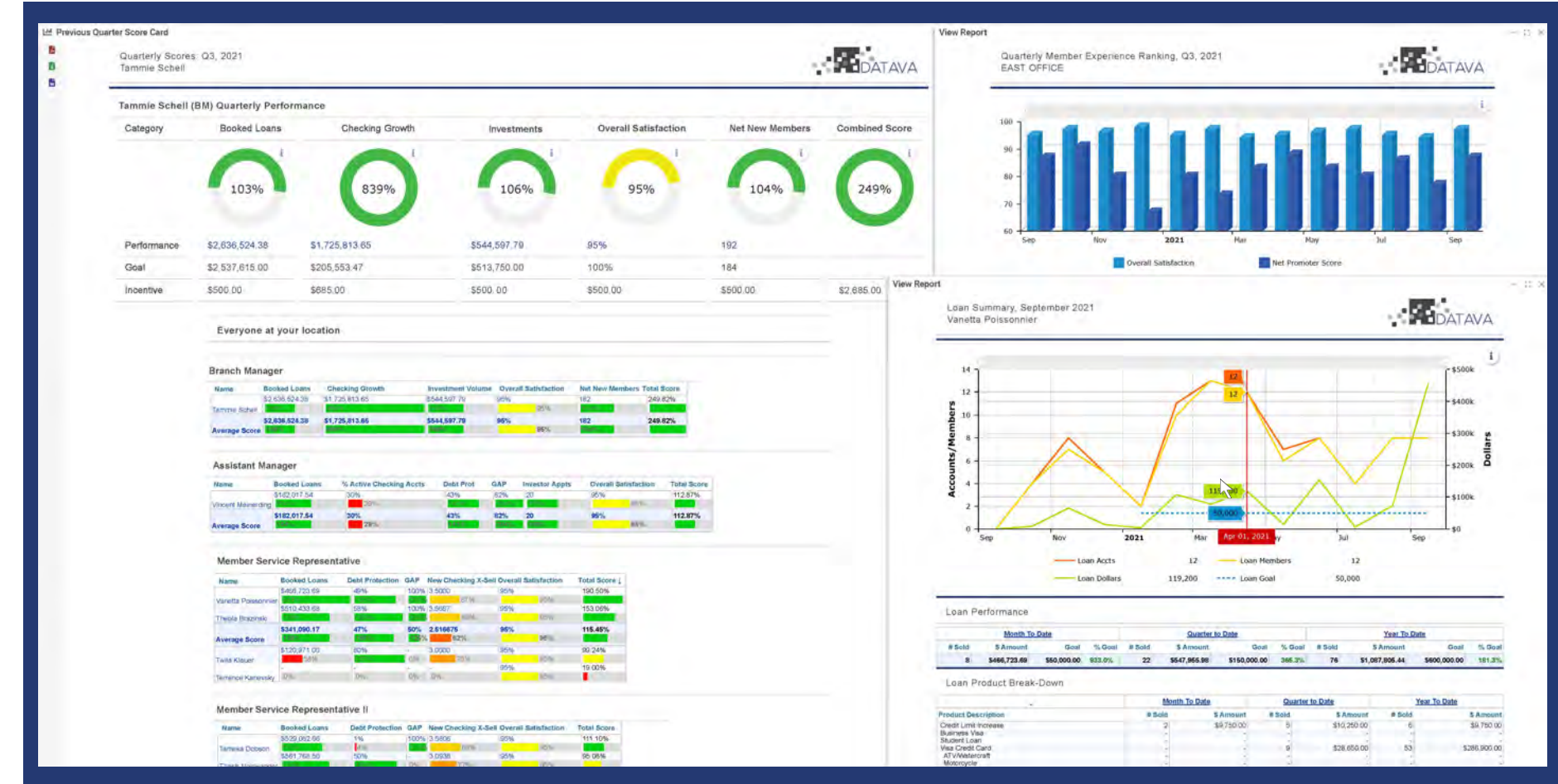


GOALS AND INCENTIVE TRACKING



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.

GOALS AND INCENTIVE DASHBOARD



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.





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.

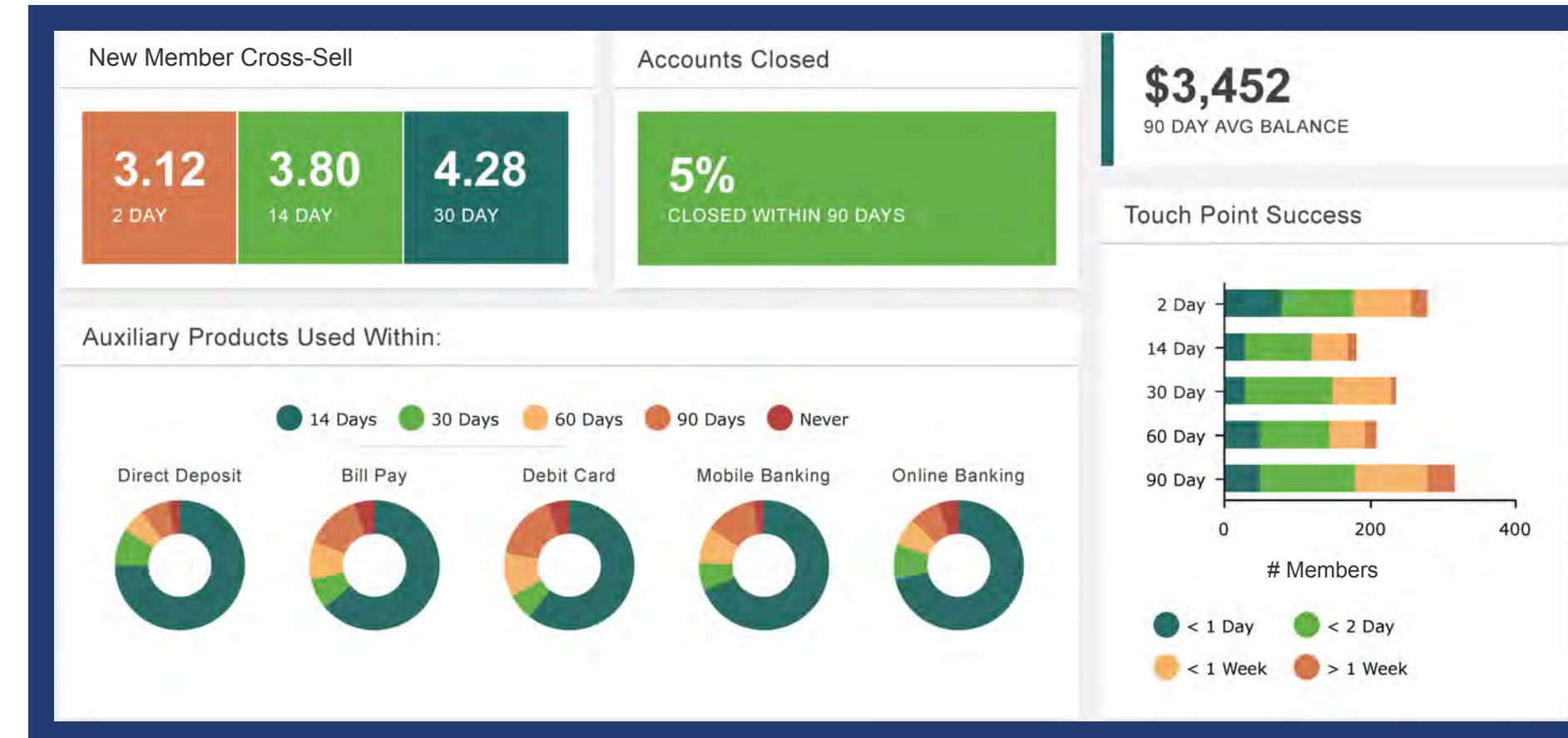
 **DASHBOARDS**
Improve employee productivity with easy-to-understand dashboards, automated task lists, follow-up scheduling, and collaborative member management.

 **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.

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 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 LOYALTY

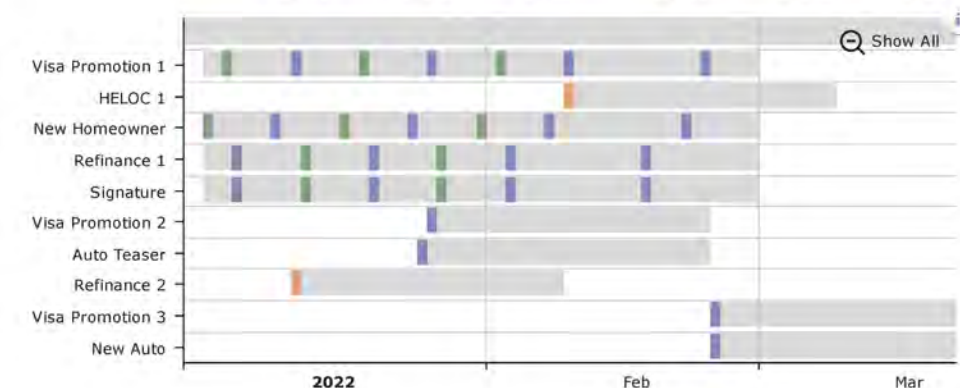
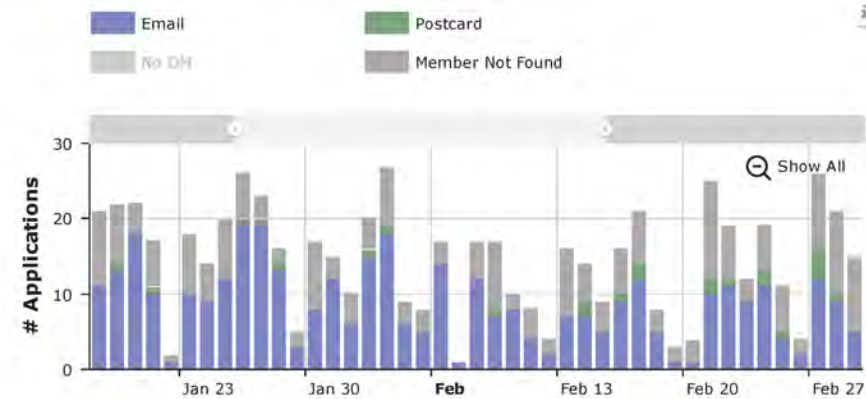
Determine if marketing is having an effect on member churn, net promoter and more.

Campaign Summary (All Campaigns), Q1, 2022



Product	Email		Post card		No DM		Non-Member		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



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, 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.

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 MEMBERS

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

EXPAND MEMBER RELATIONSHIPS

Build trust and deepen relationships with your members 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.

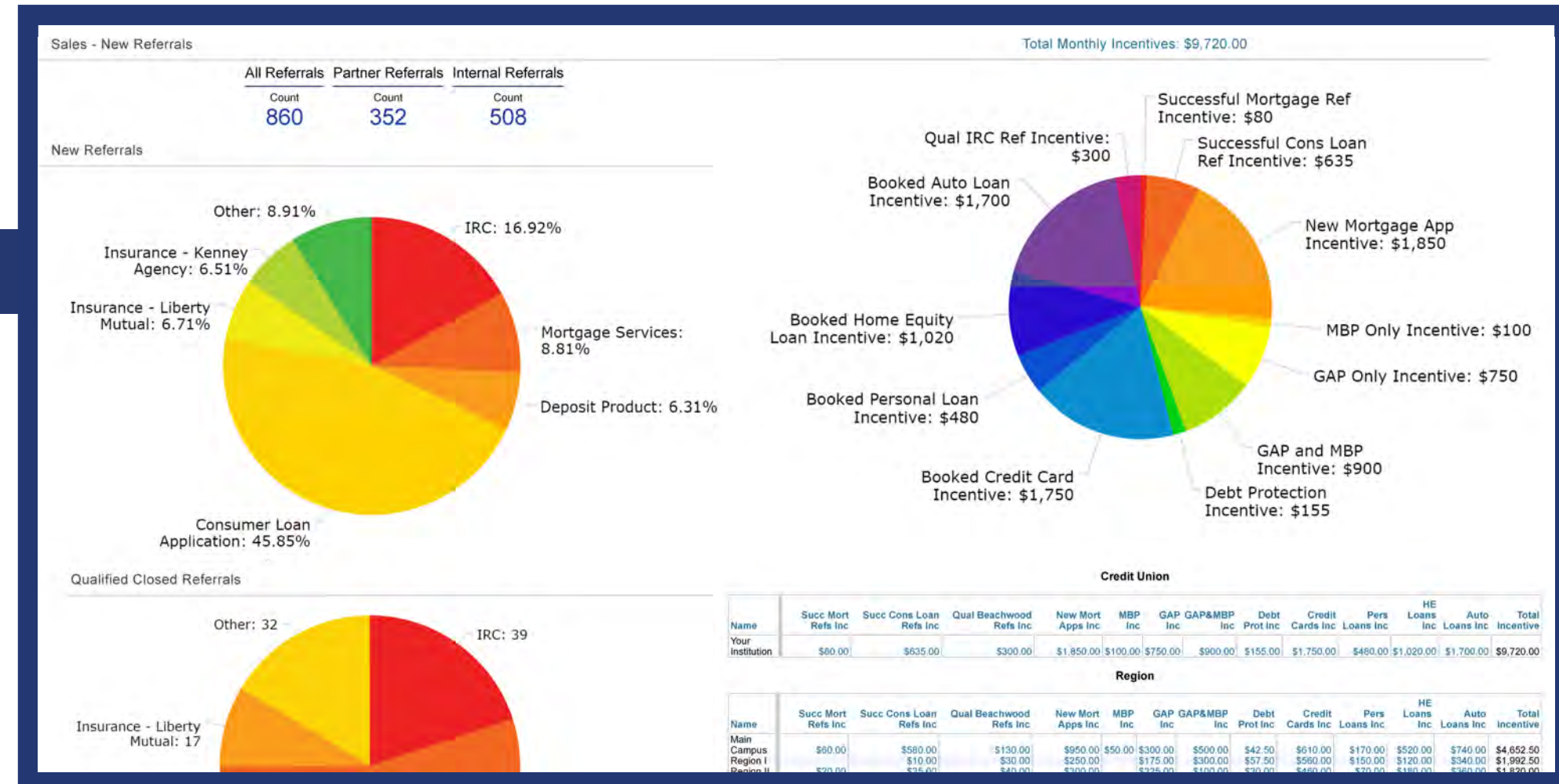
MAXIMIZE CROSS-SELL

Grow your share of wallet with your members 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.

REFERRAL MANAGEMENT INTERFACE



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.



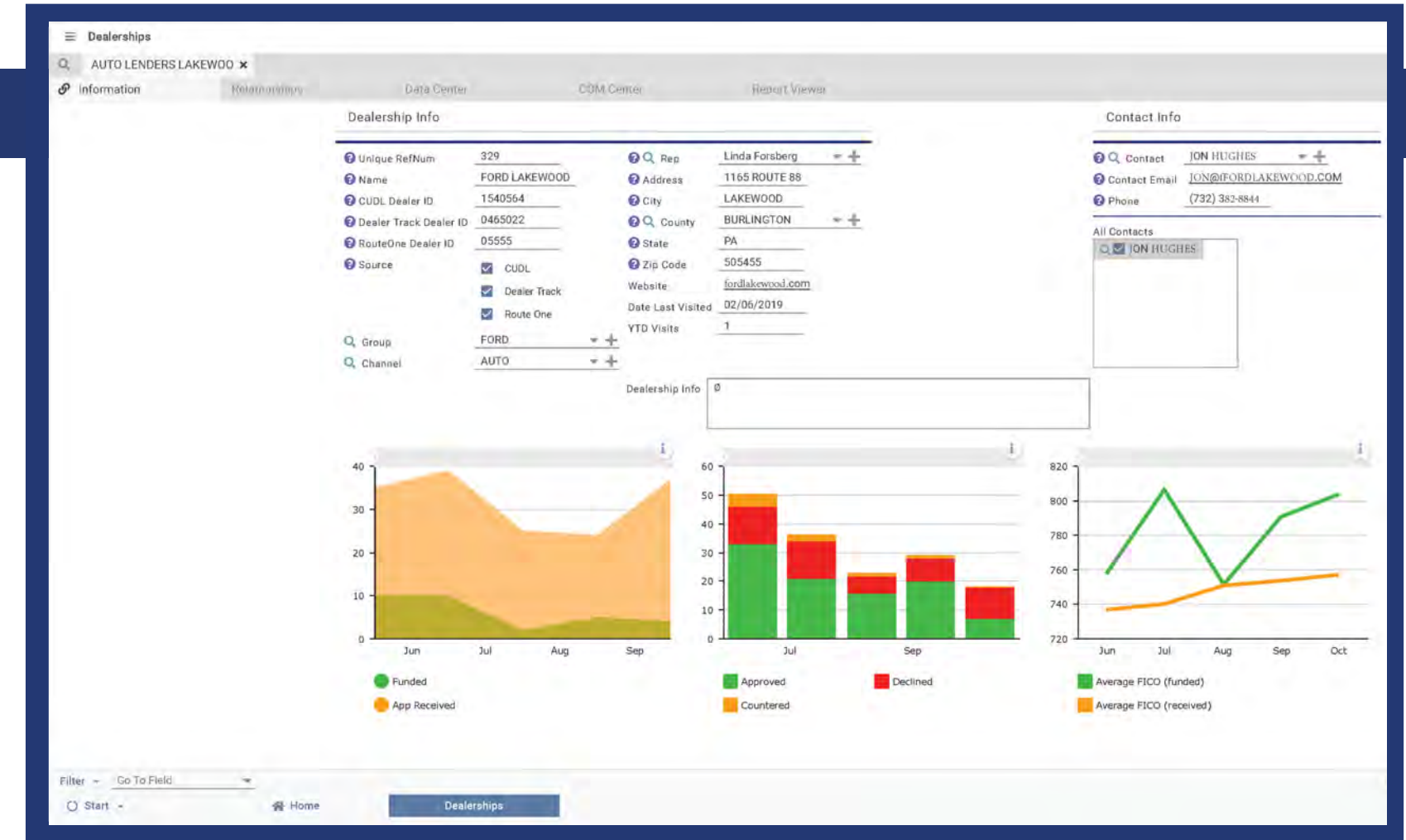
SCHEDULE FOLLOW-UPS

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.



BUSINESS INTELLIGENCE



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 members' needs or monitoring trends to predict member behavior.



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

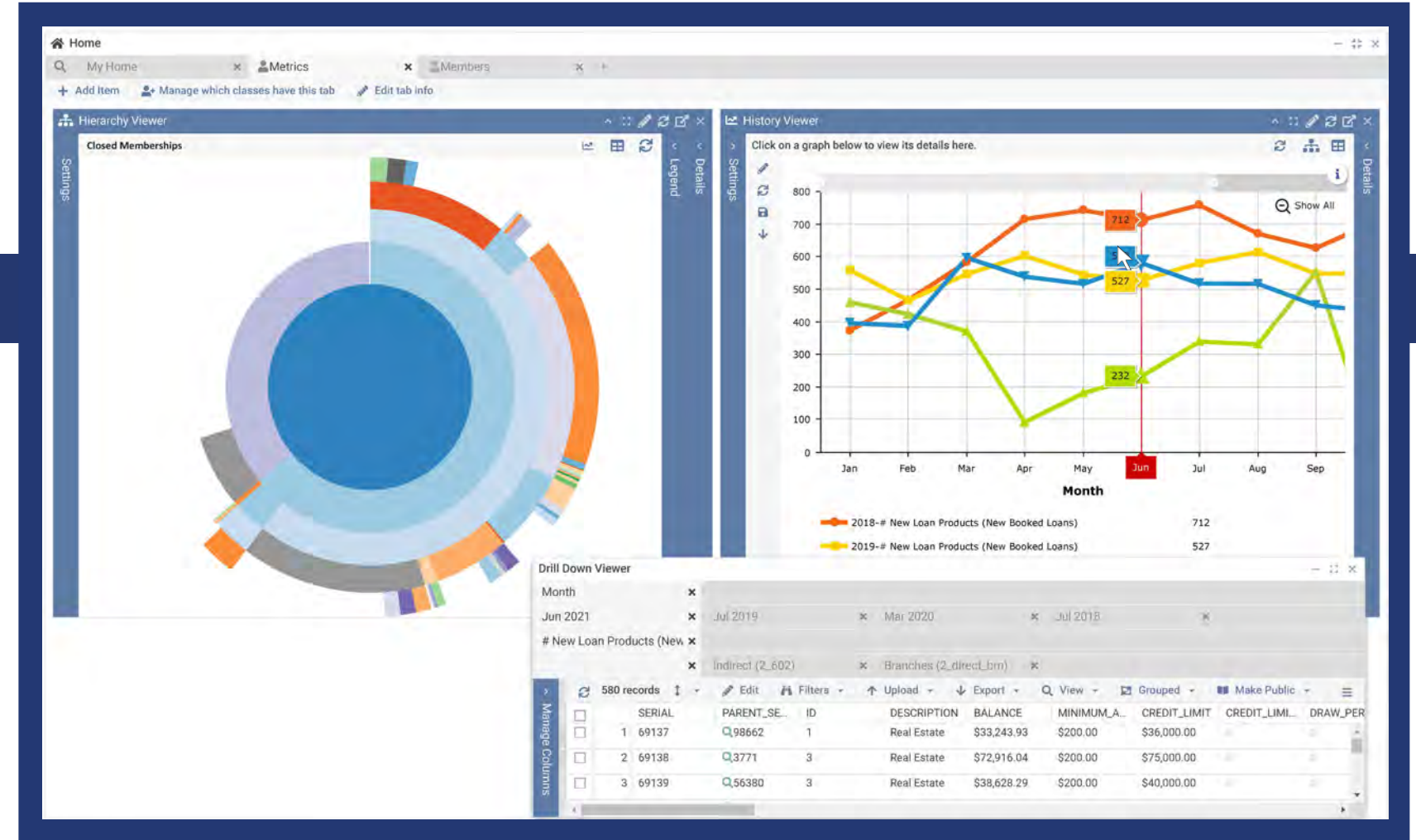
With any metric, you can drill down and audit the underlying data as well as better communicate by setting up proper role-based access to ensure everyone on your team can access the same data at the same time.



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.

BUSINESS INTELLIGENCE DASHBOARD



Datava's hierarchy visualization tool allows you to quickly understand all levels of any metric from the credit union 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.

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 members 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 member 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.



MEMBER-CENTRIC JOURNEY

Deliver a frictionless member journey from application to close that drives growth, increases productivity, and deepens member satisfaction.



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.



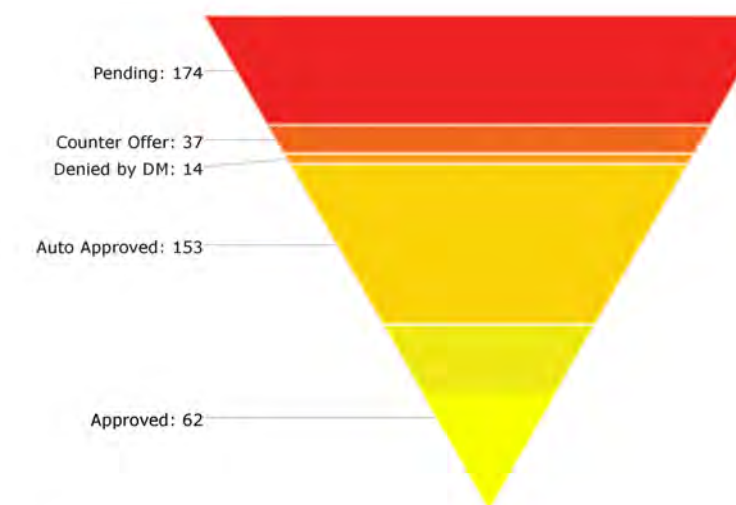
NEVER MISS FOLLOW-UPS

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

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	\$6,640,452.21	254.8	37	\$889,640.64	12.8	14	\$332,558.78	35.4	153	\$2,505,037.54	158.6	62	\$3,311,898.58	86.7	440	\$13,679,587.75
Credit Card	16	\$39,000.00	441.3	7	\$11,500.00	19.1	-	0%	-	17	\$114,150.00	137.9	4	\$29,000.00	415.3	44	\$193,650.00
Closed End	99	\$2,749,953.21	315.0	26	\$510,140.64	11.5	14	\$332,558.78	35.4	134	\$2,383,887.54	156.1	25	\$964,898.58	136.4	298	\$6,941,438.75
Line of Credit	59	\$3,851,499.00	103.3	4	\$368,000.00	9.5	-	0%	-	2	\$7,000.00	503.0	33	\$2,318,000.00	9.3	98	\$6,544,499.00

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.

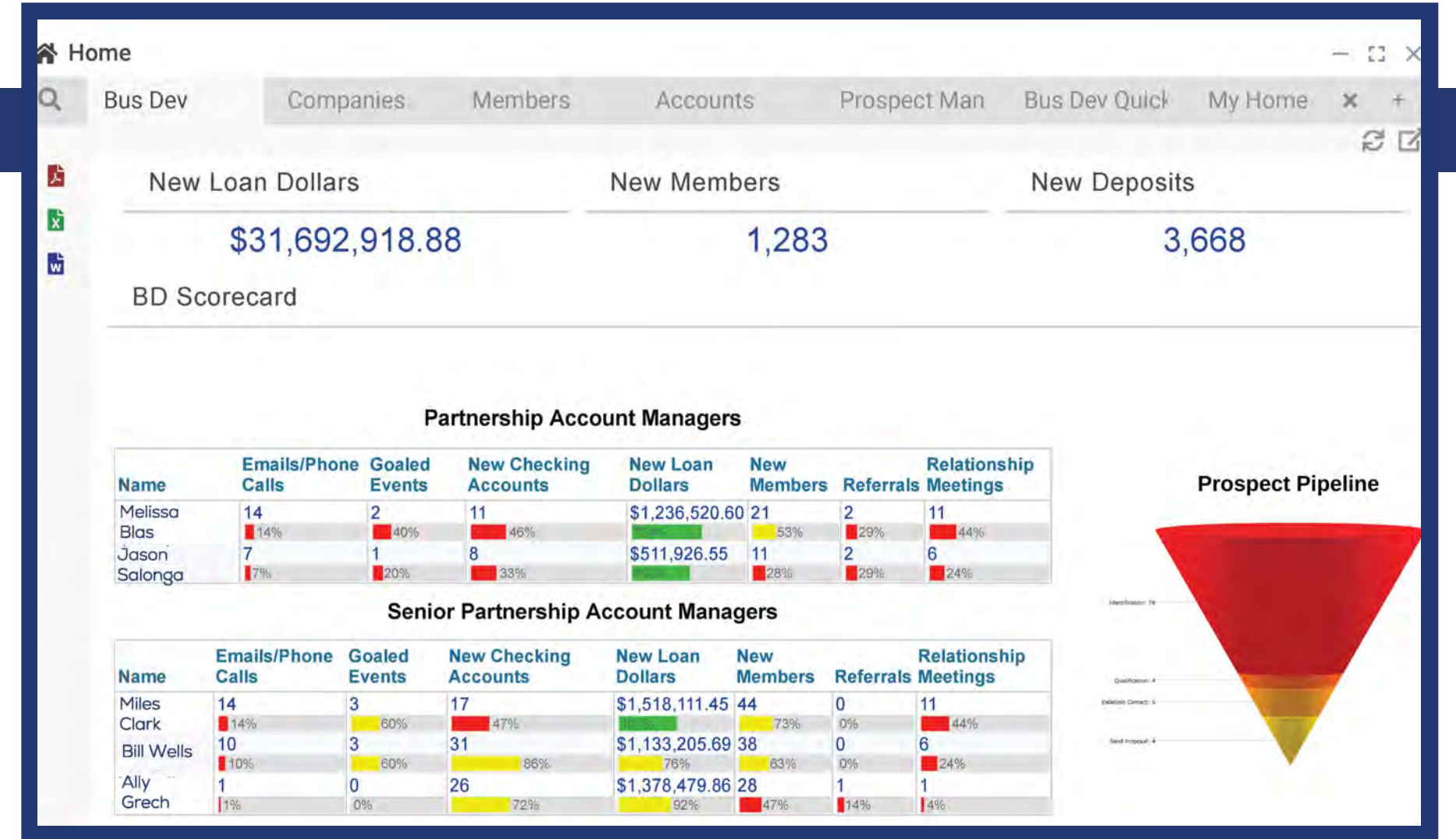
DATA DRIVEN
Understand the actual deposit and loan dollars sourced by each SEG.

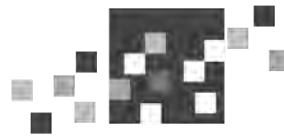
EFFECTIVENESS TRACKING
Schedule and track the effectiveness of campaigns, events, sponsorships, donations and more.

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.





OUTBOUND PROSPECTING

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.



SCHEDULING

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



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.



PIPELINE MANAGEMENT

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



AUTOMATED NURTURING

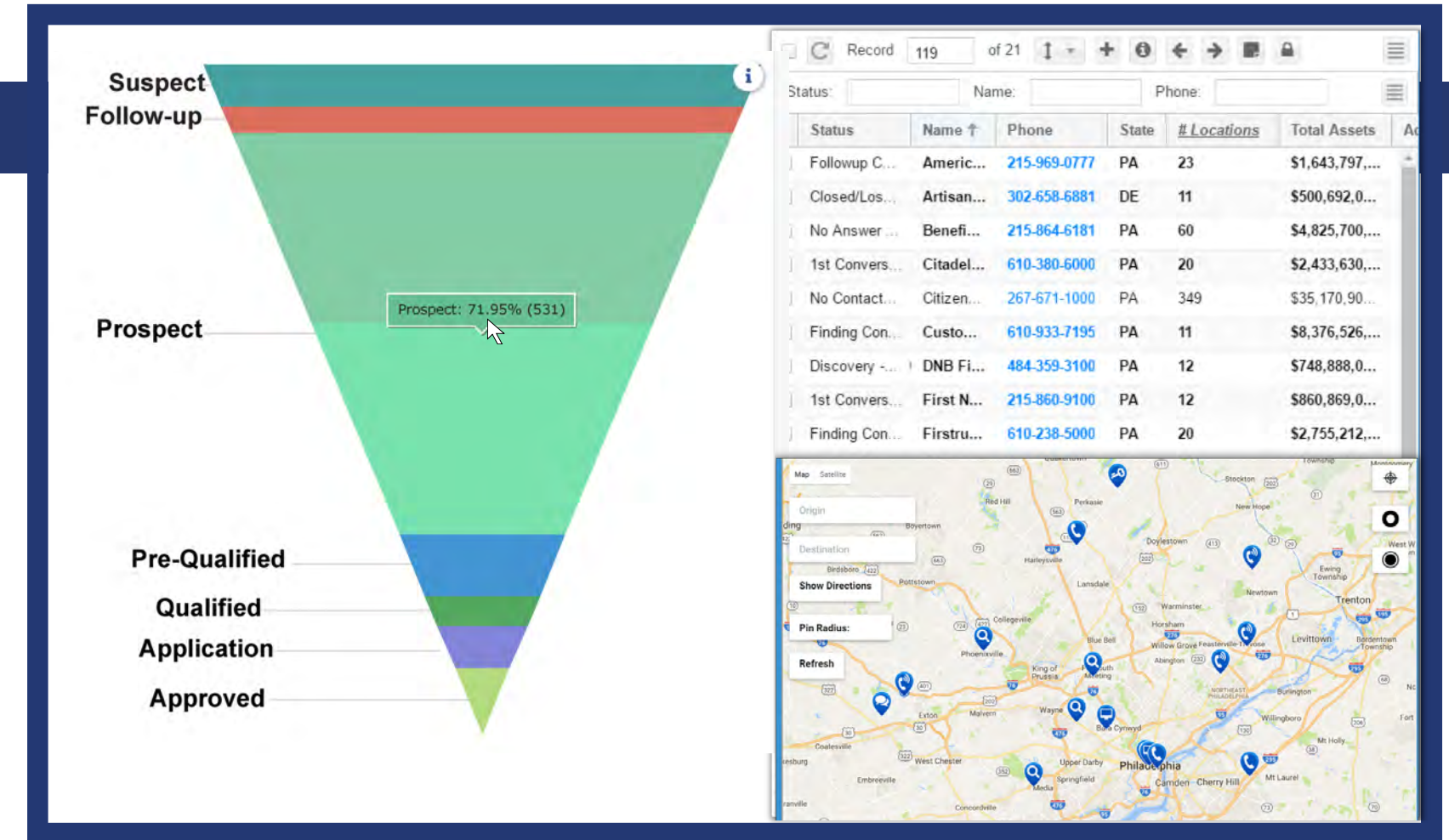
Warm leads with integration to outside marketing automation platforms, or use Datava's internal nurturer.



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.

OUTBOUND PROSPECTING TOOLS



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.

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.

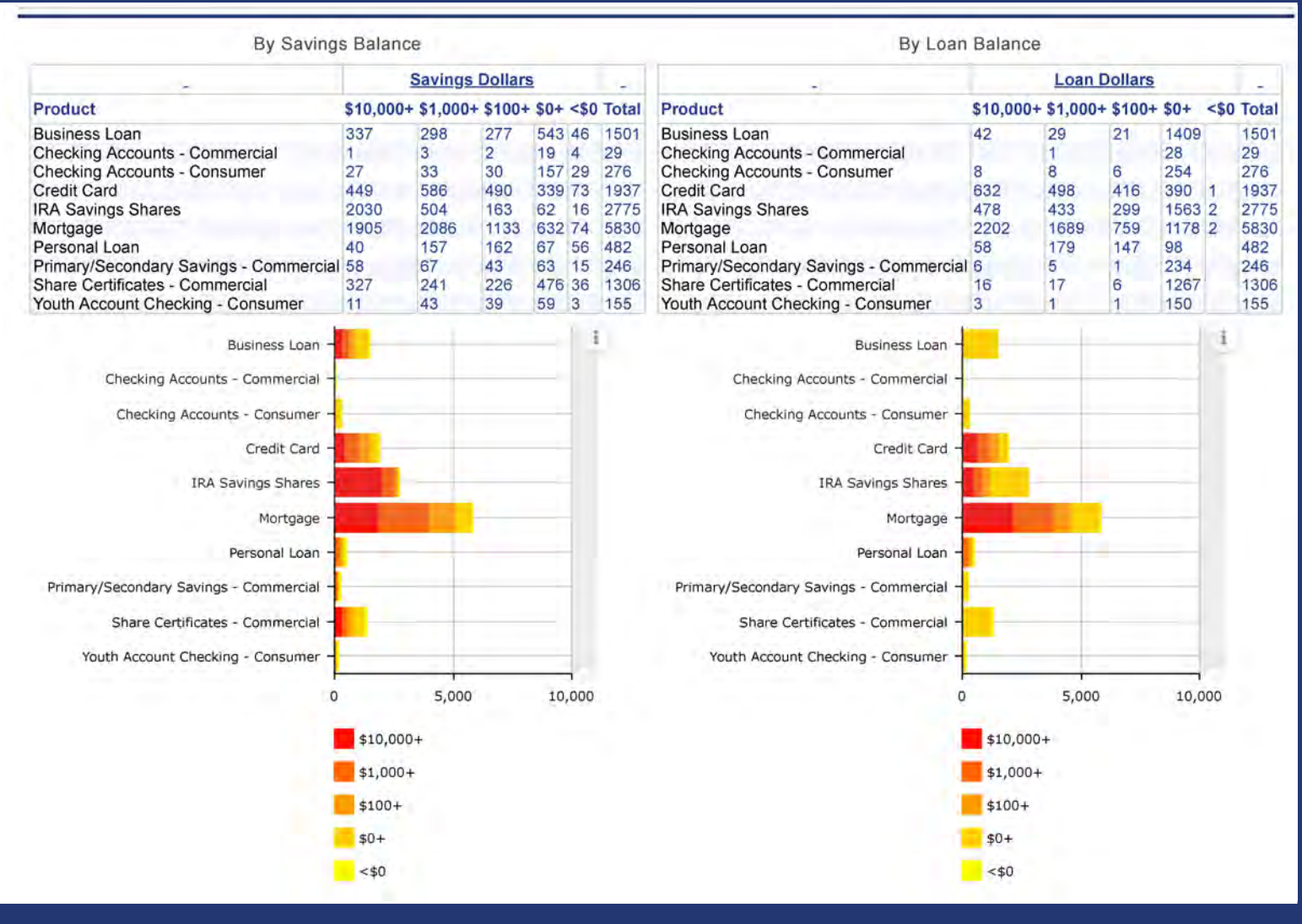
ROOT CAUSE ANALYSIS
 Uncover root causes to lost productivity, lost sales opportunities, and other process inefficiencies that are costing the credit union money.

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.



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.

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.

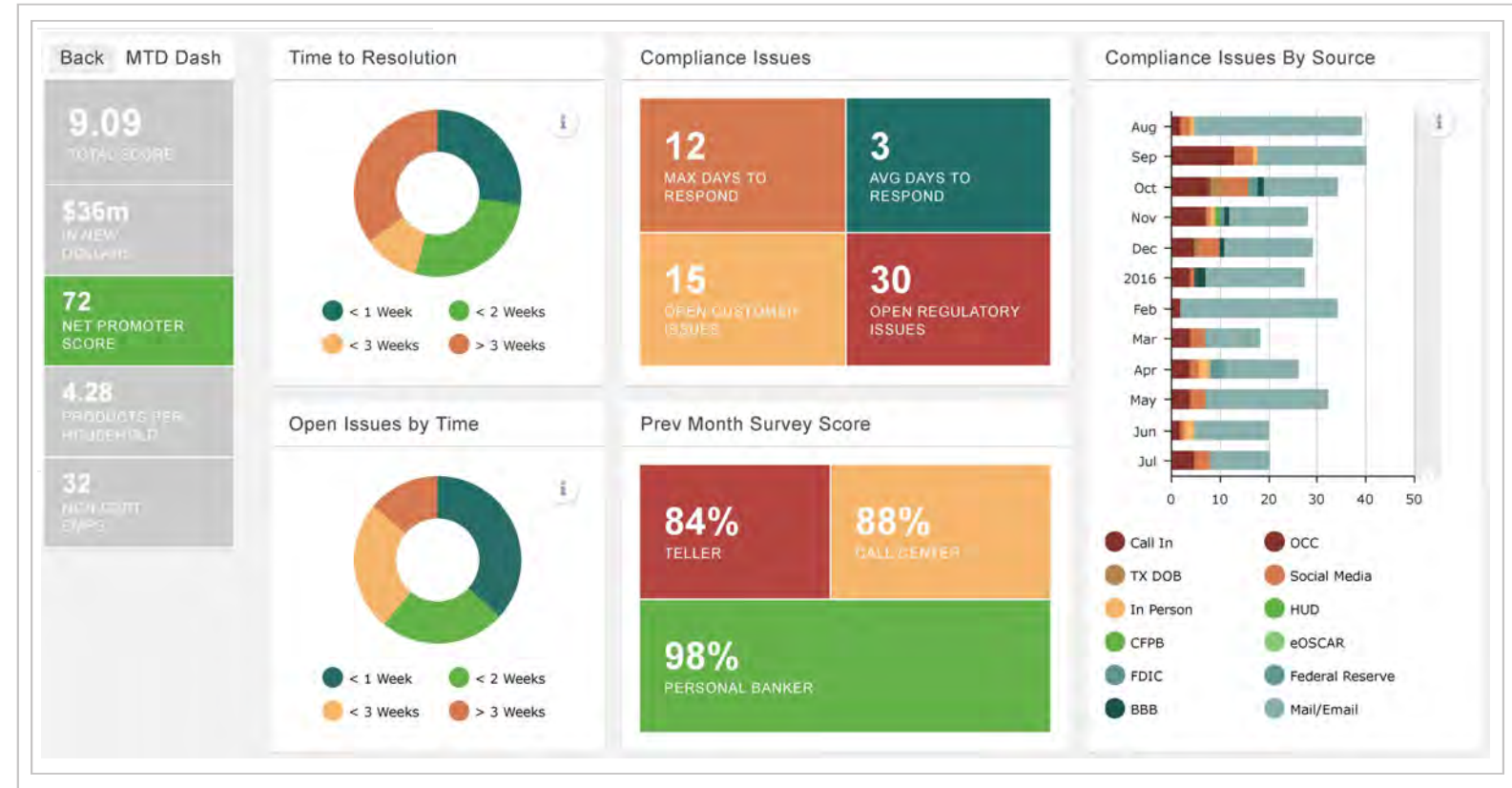
Involve the right departments at the right time, and monitor the progress of each critical member issue. Best of all, the system will provide easy access to compliance audit reports and performance dashboards.

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 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



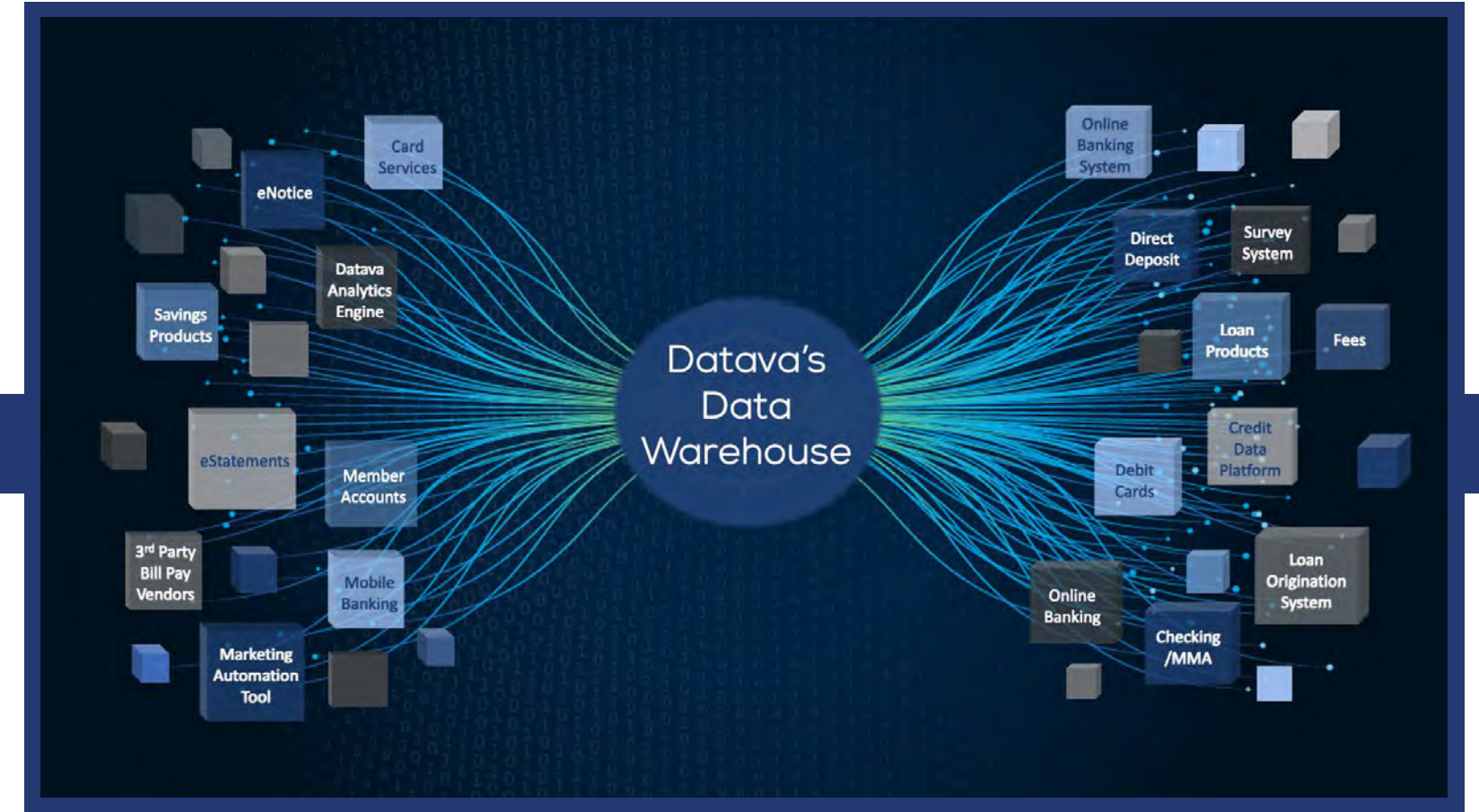
Efficiently monitor and identify employee product knowledge deficiencies. Improve member retention by ensuring they receive accurate and targeted information from staff.

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.

DATA WAREHOUSE



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.

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.



SUCCESS STORIES

datava.com/case-studies



11,000 MORTGAGE REFERRALS

generated

\$167 MILLION

in new mortgages



**480 VICE PRESIDENT AND
BRANCH MANAGER STAFF
HOURS SAVED PER YEAR**

**through automating
Goals and Incentives**



**MEMBER ONBOARDING
produced
180 LOANS AND 130
ADDITIONAL DEPOSIT
PRODUCTS**

in the first 6 months

FEATURED SUCCESS STORY



**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**



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RELATIONSHIP MANAGER

GOALS AND INCENTIVE TRACKING

REFERRAL MANAGEMENT

DATA WAREHOUSE

ONBOARDING MANAGER

CAMPAIGN SUCCESS MANAGEMENT

BUSINESS INTELLIGENCE

INDIRECT LENDING

SEG MANAGEMENT

LOAN APPLICATION PIPELINE

OUTBOUND PROSPECTING

AND MORE

PREDICTIVE ANALYTICS

PROBLEM RESOLUTION/COMPLIANCE

LEARNING MANAGEMENT