Essential Analytics

rise ANALYTICS
A Trellance company

For credit unions just starting on their analytics journey, finding an analytics platform that meets your needs can be a difficult task. That's why Rise Analytics offers **Essential Analytics** – a data analytics offering built to meet your needs.

Be Data-Driven – At Any Level

Essential Analytics lets your credit union use data to drive decisions. Start strong with powerful features that deliver immediate value:

Data Warehouse
organize and centralize your data

Library of Key Dashboards
instant visibility into members, loans and transactions

Next Best Product Predictive Model
anticipate member needs

Predictive Marketing Campaign
reach the right members with the right offers

And you can grow from there: add more predictive models and deploy additional marketing campaigns as your credit union evolves. All backed by Rise Analytics' white-glove service: seamless onboarding, personalized user training and hands-on data support.

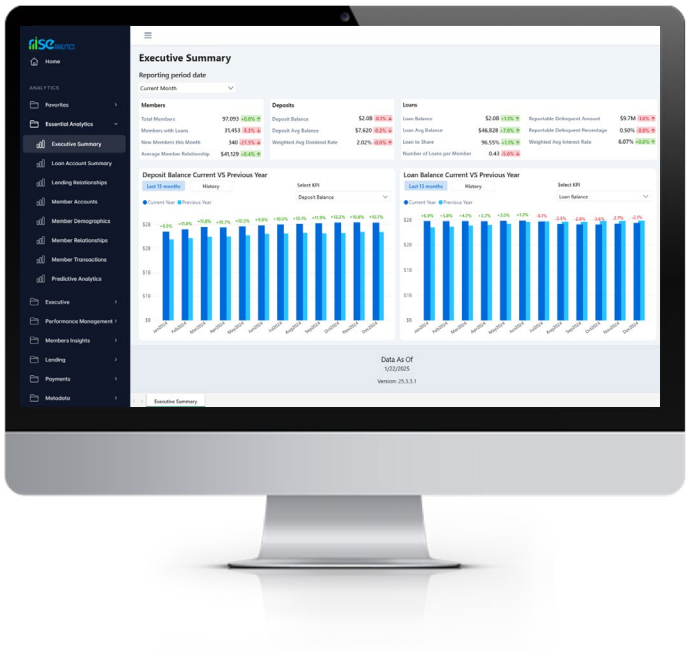
13M
Members Served

124
Credit Union Clients

$245B
Client Assets Represented

Powerful Dashboards to Help Drive Decisions

Essential Analytics gives you access to impactful dashboards empowering you to better understand your members, uncover opportunities and fuel growth:



1. Executive Summary
2. Loan Account Summary
3. Lending Relationships
4. Member Accounts
5. Member Transactions
6. Member Relationships
7. Member Demographics
8. Next Best Product AI
9. Data Validation

These dashboards provide clear monthly snapshots of your members, their transactions and your loan portfolio, making it easy to spot opportunities for growth, uncover risks and strengthen member relationships.

From Insight to Action: Predictive Marketing Campaign

Essential Analytics goes beyond reporting: the Predictive Marketing Campaign transforms insights into action. Built to execute recommendations from the Next Best Product AI model, it provides a fully managed campaign service that ensures your credit union doesn't just uncover opportunities, you capitalize on them.

Contact Rise Analytics today, to embrace a future where data drives success.

Get in Touch

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