

Answer quick questions with Scorecards.

What is it?

Scorecards provide short, simplified analysis you can obtain on a recurring basis and are often used to make decisions that can impact your ROI on future marketing campaigns, improve daily operations, and provide you with a deeper understanding of different areas of your membership.

Available Scorecards

Call Center Scorecards

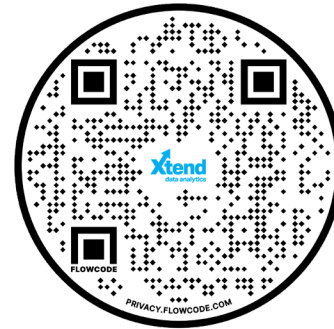
A short analysis of your wrap up codes provides you with a detailed breakdown of who called your credit union last month, and why they called.

- Get a better understanding of who and why your members call the credit union. It can improve your internal operations and communications with these members.
- 1-page PDF with a breakdown of your wrap up code usage, the members who call, and recommended action items.

Marketing Scorecards

An informational report of your membership breakdown and the products and services they hold.

- Provides details on your membership, and offers up next steps to improve different areas of your credit union and membership participation.
- 1-page PDF with a breakdown of your membership and recommended action items.



Losing the Love Scorecards

A short analysis of your recently closed memberships and currently active but disengaging members. Includes detailed breakdowns of reasons members closed their accounts, age and tenure of closures, and some disengaging behaviors to watch for in your membership.

- Provides details on your current and recently left members, allowing you to study whether retention services should be a focus and the chance to increase member retention.
- 1-page PDF with a breakdown of closed and/or disengaging members and recommended action items.

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