

# Losing the Love Scorecard

Success Credit Union

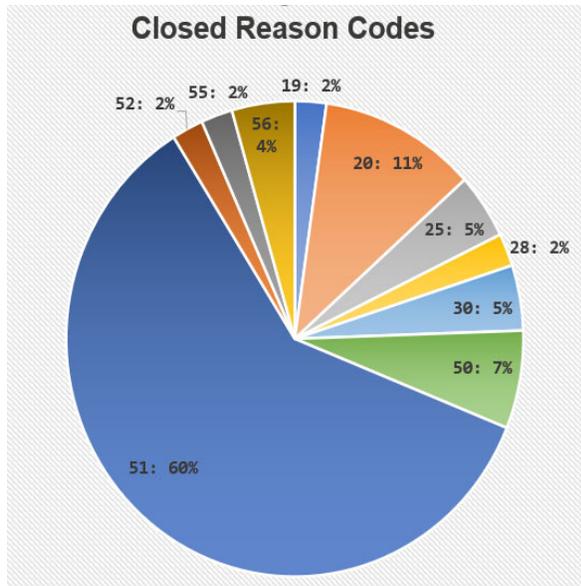
Data Current as of: 11/24/2021

## Membership Overview

Total Active Members:	5,277
Members Closed Last Month:	45
Net Gain/Loss Members Last Month:	-27
Net Change Dormant Members:	(+)10

## Closed Members Overview

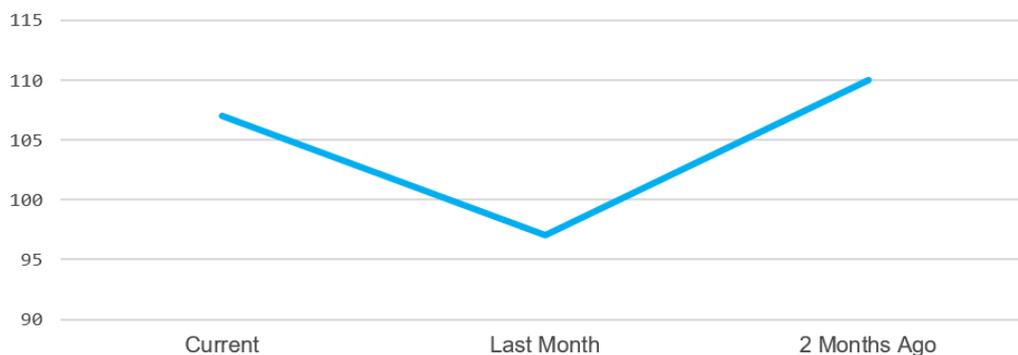
Average Age:	43
Average Tenure:	8
Top Close Reason:	Inactive
Top Member Designation:	Individual



## Active Members Overview

Average Age:	47
Average Tenure:	10
Top Open Reason:	Referral
Top Member Designation:	Individual
# Approaching Dormancy:	442
Avg. # Closed Sub Accounts:	0
Avg. % Savings Bal Change:	(+)7%
Avg. Tiered Svc Points Decrease:	3
Avg. # Svc Unenrollments:	0

## Change in Dormancy



## Behaviors and Members to Watch

### Closed Membership Behaviors

Avg. # Closed Sub Accounts:	2
Avg. % Savings Bal Decrease:	87%
Avg. Tiered Svc Points Decrease:	0
Avg. # Svc Unenrollments:	0
# Dormant Members:	24

### Active Members Disengaging

# Members Closing Sub-Accounts	0
# Members Decreasing Savings:	1,857
# Members Decreasing Tiered Svc:	937
# Members Svc Unenrollments:	718
# Dormant Members:	107

Want to see your data in action?

Contact Xtend DA: [info@xtendcu.com](mailto:info@xtendcu.com)



# Losing the Love Scorecard

Success Credit Union

Data as of: 11/24/2021

## Top Findings: Your Members

- **27 members closed their memberships with you last month**, and most of them were closed due to inactivity. Is this a pattern from month to month? How many memberships have closed this year, and due to what reasons?
- Most active memberships were either opened for no recorded reason or for a "Referral." How often do you run referral programs/promotions? Have you noticed a high success rate with these?
- **Over 400 of your members** (8% of your memberships) **are in your DIWARN file** today. This means there are over 400 members approaching dormancy. How are you reaching out to them?
- While the majority of your active membership has increased their overall savings and checking balances with you over the last few months, 35% have decreased these same balances. **Have you reached out to them yet?**
- **Dormancy in your active membership appears to have increased from last month.** While this number has fluctuated over the last few months, it would be wise to watch this and reach out to your members prior to them reaching dormancy to keep this number steady on a regular basis, and lower the average.

## Recommended Next Steps

### Marketing Recommendation

### Analysis Recommendation

**Want to see your data in action?**

Contact Xtend DA: [info@xtendcu.com](mailto:info@xtendcu.com)

