

Use enhanced insight from new members to develop relationships and sales **via New Member Reporting.**

What is it?

One of the most integral points for developing relationships with your members is when they first join the credit union. New Member Reporting helps you to see the impact your staff and current marketing services are making on your new members, and tracks how engaged your new members are within the first 90 days of their membership. Customized to your credit union, this monthly report is something that can easily slide into your board report and answer questions without having to comb through rows of data.

What are the benefits?

Monthly reporting

Review and evaluate your current New Member Onboarding processes for efficacy.

Improved sales conversations

Gain coachable knowledge into how successful your staff is at trying to sell to new members.

Improved member relationships

Learn what services and products your new members are most likely to take advantage of within their first 90 days at your credit union.

Continuous Analysis

Add more to your board report and quickly answer questions for your upper management teams with a revealing PDF report and direct access to the CU*BASE file that holds detail level information.

What's possible?

New Member Reporting is completely customizable by you and your marketing and sales teams, and our expert staff can offer up feedback on what to watch for. Ideal inspiration for what to include in your monthly tracking:

- eStatement enrollment
- Online Banking and/or Mobile App usage
- eNotice and/or eAlert enrollment
- Bill Pay enrollment
- Membership open reasons
- Age of new members joining
- Loans opened by new members
- Checking accounts opened by new members
- Savings accounts opened by new members
- CDs opened by new members

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