

Sharetec Dashboard 2.0



Gas & Electric Credit Union's Experience Using Sharetec Dashboard 2.0

Sharetec's Dashboard 2.0 offers credit unions a unique solution to reporting and is designed specifically for financial, lending, membership, and transaction analysis. Sharetec Dashboard 2.0 helps credit unions dramatically reduce the time it takes to access vital data.

Credit unions can see the Trend Analysis, ROA, Loan to Share, Deposit and Loan breakdown daily on a desktop, tablet or mobile device. Daryl Empen, President of Gas & Electric Credit Union, comments, "The lending dashboard has been especially useful to our lending staff. They can filter the delinquent loan report by loan officer, balance, delinquency, loan type, or any way they want to quickly see who may need attention. They can view loan originations by officer to see where our growth is coming from, and to monitor trends in our loan origination."

Credit unions can also see where members' residence is concentrated and what products they are using, as well as the age breakdown of entire membership. Daryl has also expressed how the credit union has been able to modify some reports, adding fields that are important to them for a particular report or graph, to make the product even more useful to them. "Sharetec Dashboard 2.0 has eased our workload, and given us more tools to be able to judge our financial performance quickly and easily. I recommend every credit union utilize this product."

Daryl adds, "I love the ability to see a snapshot of our financials quickly every morning—whether it's growth in assets, shares, loans or net worth, our delinquent loans, membership growth, or any number of areas. Whether you're a visual person, or analytical, Sharetec Dashboard 2.0 makes it easy to see the decipher changes and trends, with minimal effort."

Matt Isger, Regional Director for Sharetec, comments, "CU management has responded really well to the graphical representation of their data. From the lending department to the number of transactions by branch, it has been so helpful. Board members have also provided feedback that the dashboards have made the data much easier to analyze."



Overview

Sharetec's Dashboard 2.0 provides a graphical representation of the CU data, quickly and easily.

Problem

Gas & Electric CU was combining data from several reports to get an understanding of how well the CU was doing.

Solution

Since utilizing Sharetec's Dashboard 2.0, Gas & Electric CU has eased their workload and can now assess their financial performance quickly and easily.

Results

- Reduce Workload
- Access Data Quickly
- Mobile Friendly
- Analyze and Respond to Market Trends