



# Aunalytics Dashboards Deliver Insights and Actionable Business Opportunities to Mid-Market Banks and Credit Unions

*Dashboards Augment Capabilities of Aunalytics Daybreak for Financial Services Cloud-Native Data Platform to Drive Customer Intelligence and Strategic Value*

The Aunalytics logo, featuring the word "aunalytics" in a blue, lowercase, sans-serif font. The "a" is a lighter shade of blue than the rest of the word.

SOUTH BEND, IN, UNITED STATES, July

12, 2022 /EINPresswire.com/ -- Aunalytics, a leading data platform company delivering Insights-as-a-Service for mid-market businesses, announced today a new set of pre-built dashboards that augment the value delivered by the company's Daybreak(tm) for Financial Services solution. The Daybreak dashboards are designed to deliver insights and actionable business results by revealing opportunities associated with customer, competitive, marketing, lending, and branch data and automatically presenting the data in a way that is easily understood, without any manual processes required.

Customer intelligence and personalized marketing in a digital world matters more than ever before, especially for mid-market banks that have traditionally relied on hometown, white glove service to win customers. With Aunalytics Daybreak for Financial Services, midsize financial institutions can target-market more efficiently, reach high-value customers with the right product offering, and win business away from competitors to expand value. With the new Daybreak dashboards, mid-market banks and credit unions can achieve greater visibility into their data and identify more opportunities to strengthen their position in regional markets and compete more effectively.

The Daybreak for Financial Services cloud-native data platform integrates and cleanses data for accuracy and mines transactional data daily with AI-powered algorithms for customer intelligence and timely actionable insights that drive strategic value.

New Daybreak Dashboards include:

**Customer Profile** - This dashboard delivers an enriched profile of individual customers, powered by AI- insights that deliver intelligence on future customer growth beyond mere aggregations and reports of the past. The Customer Profile offers a 360-view of each customer including

analysis of data integrated from multiple sources across the organization, and mined daily for timely fresh insights that can be acted upon. Banks can identify accounts that a customer has with competitors in order to make a more attractive offer to win their business and grow customer value. They can also determine the next best product offering for customers today, based upon their transactional behavior, and gain a deeper understanding of customers and the branches they use, beyond the origination branch.

**Competitor Payments** - Competitor Payments reveals insights for each customer, each competitor, and type of financial product. The dashboard tracks competitor payments by amount and how long they have been taking place so that a banker or credit union can determine when customers or members are likely to look for a new product, then create better offers as a result. Competitor Payments can drill down on credit cards, mortgages, auto loans, and investment products to identify a more competitive offer and use the segmented Customer List dashboard to target them. By using targeted competitive offers made to the right customers at the right time, banks can efficiently grow value from customers to increase net deposits.

**Retail KPI** - Retail KPI (key performance indicators) help banks to increase total deposits and accounts, and identify growth opportunities and potential. The dashboard delivers key performance metrics to retail leaders to understand the drivers of their account and deposit growth. It enables them to analyze deposits and balances over time and understand growth trends. It also provides data for overall institution performance, as well as detailed performance for each region, branch, market, product type and individual product to identify opportunities for growth and understand which branches are driving change.

**Lending KPI** - The Lending KPI dashboard delivers key performance metrics to lending leaders to understand the drivers of their loan and loan balance growth. It enables them to view trends over time for original loan amounts and outstanding loan balances. The dashboard provides data for overall institution lending performance and detailed performance of lending by branch, region, market, product type, and each product to uncover opportunities for growth and understand which products, team members, and branches are driving growth. The accompanying Lending Officer dashboard reveals performance insights by team member and shows loans closed and principle amounts over time.

**Marketing KPI** - This dashboard delivers key performance metrics to marketing leaders on campaign effectiveness to improve targeting and reduce account acquisition cost. It enables banks to target their institution's marketing to reach the right customer at the right time with the right offer, making marketing operations more efficient and successful by using a data driven approach.

Capabilities include:

- Track campaign performance by resulting deposits and new accounts
- Understand customer acquisition cost by region, branch and product type
- Assess account and balance growth by region, branch, and product type

- Understand new account demographics

Branch Reassignment - The Branch Reassignment dashboard delivers key information to business leaders to understand branch utilization and change over time based on where a customer originates and performs business. They can identify branch growth opportunities and areas where efficiencies can be improved, and view branch utilization to see customer banking patterns. With this, banks can determine which products to market at a particular branch and more precisely target those customers who are likely to need that product.

“Daybreak dashboards offer more than just reporting on the past. They connect the dots of relevant data and use predictive analytics to create a picture revealing intelligent insights that help financial institutions build smarter business strategies,” said Kyle Davis, Vice President of Daybreak, Aunalytics. “Designed to accelerate the value derived from AI-powered insights, Daybreak dashboards enable mid-market banks and credit unions to more clearly see the opportunities presented by their data and take action to increase net income and advance their competitive position.”

#### About Aunalytics

Aunalytics is a data platform company delivering answers for your business. Named a Digital Innovator by analyst firm Intellyx, and selected for the prestigious Inc. 5000 list, Aunalytics provides Insights-as-a-Service to answer enterprise and mid-sized companies’ most important IT and business questions. The Aunalytics® cloud-native data platform is built for universal data access, advanced analytics and AI while unifying disparate data silos into a single golden record of accurate, actionable business information. Its Daybreak™ industry intelligent data mart combined with the power of the Aunalytics data platform provides industry-specific data models. To learn more contact us at +1 855-799-DATA or visit Aunalytics at <http://www.aunalytics.com> or on Twitter and LinkedIn.

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