

Marketing & Member Analytics Engine

Turning Member Data into Measurable Growth
Empower your credit union with AI-driven marketing intelligence to boost member retention, deepen relationships, and accelerate ROI

The Challenge

Credit unions face rising competition from banks and fintechs offering fast, hyper personalized experiences. Yet many still struggle to measure marketing effectiveness, identify high potential members, and detect early warning signs of attrition. Without unified insights across campaigns, channels, and products, opportunities for growth, cross-sell, and retention remain hidden in disconnected data silos.

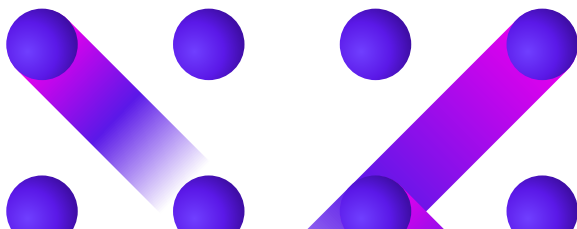
The Solution

The Marketing & Member Analytics Engine unifies your core banking data, CRM, and digital engagement channels, loans systems, credit card systems, and, other solutions into one intelligent view of your members. By combining AI-driven segmentation, predictive modeling, and campaign attribution, it helps credit unions:

- See exactly which campaigns drive growth
- Predict which members are ready for deeper relationships
- Proactively engage those at risk of churn
- Identify high-value cohorts and member households to design more personalized outreach

Improve product profitability and member-level ROI through granular, data-driven insights

With actionable intelligence delivered in real time, marketing and leadership teams can personalize outreach, optimize spend, and measure impact — all from one platform.



Key Features



Categorization of Members into Related Parties

Group members into logical households or related entities to understand collective value, manage relationships more effectively, and improve cross-selling strategies.



Churn Prediction

Spot early signs of member attrition and trigger proactive, data-driven retention campaigns.



Campaign Attribution

Understand which marketing channels and messages generate new memberships, loans, and deposits — and which ones don't.



New Product Design & Repackaging

Use member insights to design or repackage products that drive deeper penetration and adoption.



Customizable Dashboards

Monitor KPIs that drive growth — from membership acquisition to cross-sell success and campaign ROI.



Core & CRM Connectors



Behavioral & Life-Stage Cohort Analysis

Blend internal and external data to build behavior- and lifecycle-based cohorts for targeted product development, pricing, and marketing.



Predictive Lead Scoring

Identify and prioritize members most likely to adopt new products or services.



High-Value Cohort Identification

Detect and target your most profitable segments to deepen engagement and maximize long-term value.



Member Journey Analytics

Visualize how members interact across branch, digital, and mobile touchpoints — and uncover moments that matter most.



Automated Delivery

Seamlessly move from campaign design to onboarding with automation that connects insights to execution.

Who Uses It

- Marketing Teams — Optimize campaigns, prove ROI, and drive personalized engagement.
- Lending Teams — Focus outreach on members most likely to borrow or expand relationships.
- Member Services & CX Teams — Deliver proactive support to retain at-risk members.
- Executives — Gain a unified view of member growth, profitability, and marketing performance.

Technical Snapshot

- Deployment: Cloud-based, scalable, and ready for rapid onboarding.
- Integrations: Pre-built connectors for Core Banking Systems, Salesforce, HubSpot, Snowflake, and major Ad Platforms.
- Data Handling: Real-time ingestion, predictive modeling, and cross-channel attribution.
- Security & Compliance: Enterprise-grade data protection and compliance with financial data standards.
- Scalability: Flexible for credit unions of all sizes — from community institutions to multi-branch organizations.

The Impact

- 20–30% increase in campaign effectiveness through clear attribution and optimization
- Stronger cross-sell and upsell performance with predictive member scoring
- Up to 15% reduction in churn through proactive retention strategies
- Higher member satisfaction with timely, personalized engagement