

PROJECT BRIEF



Business Problems
Challenges
Deliverables
Outcomes
Data Sources
Technology

VISA STATEMENTS

CUSTOMER:

Federal Credit Union
– Midwest USA

PROJECT:

Member Program Reporting and Analysis

BUSINESS PROBLEM

A successful, federally-chartered credit union (\$1.2 billion in assets) had a strong desire to provide information in its Visa statements to allow its members to better understand the costs of unpaid balances over time, as well as the savings to be gained by paying down credit card balances more quickly.

Once the additional information was provided to its members, there was also the need to measure the effectiveness of this strategy in reducing interest costs to its members.

CHALLENGES

- The client had recently switched to a new statement printing company so a critical vendor stakeholder was relatively unfamiliar with the specific processes of the credit union

DELIVERABLES

- Design a reporting environment that would allow business users to easily measure program outcomes versus objectives without undue reliance upon technical staff
- Build and deploy a data mart and reporting application (WebFocus by Information Builders) according to requirements
- Establish a foundation for a broader Business Intelligence strategy which would allow the client to enrich its reporting over time through implementation of additional subject areas in a modular fashion

OUTCOMES

- Ability to more quickly deploy and assess programs to increase member satisfaction
- Create a basis for future reporting innovations
- Build a Business Intelligence competency within the organization

DATA SOURCES

- Legacy application on SQL Server 2005 database

TECHNOLOGY USED

- Microsoft SQL Server 2005
- Microsoft SQL Server 2005 Analysis Services
- WebFocus by Information Builders

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