







# Take Control of Financial Performance in Your Credit Union with BankBI

**BankBI gives you everything you need to manage performance and make the data-driven decisions modern credit unions demand – all from one powerful platform.**

Our cloud-based analytics solution integrates directly with your core banking system and general ledger to deliver actionable, daily insights. It's fast, intuitive, and requires no upfront infrastructure investment.

## Financial Performance Analytics As A Service

-  Pre-built, industry-standard KPI engine and out-of-the-box dashboards.
-  Cloud-based architecture – no server hardware maintenance and upgrade costs.
-  Generate marketing opportunity lists by member and product characteristics at the click of a button.
-  Filter data your way with customizable role-based dashboards.
-  Go live in weeks not months with pre-configured core banking and GL data integration.
-  Subscription-based model – access industry-leading financial performance reporting with no capital expenditure.



## See Where You Stand with Free Peer Analysis Software

- Access 30+ performance reports across capital ratios, asset quality, and other categories.
- Forecast your credit union's financial performance over the next five years with "what if" planning scenarios.
- Merge financial performance data from two credit unions with "what if" merger analysis.



Sign up for your free BankBI Peer Analysis account at [bankbi.com/peer](https://bankbi.com/peer)

### Finance Performance

Save time, cut costs, and reduce stress with automated daily analytics and reporting.

- Track B/S and I/S daily movements and trends.
- Track all industry-standard key ratios out of the box.
- Drill through KPIs to root cause of movements.
- Daily reconciliation of GL to core banking.
- Fully automated Board and Management reporting.

### Banking Performance

Monitor new loan and deposit activity and compare against targets.

- Analyze performance metrics by branch and loan officer.
- Monitor margins, cost of funds, and profitability.
- Track past due trends and vintage quality over time.
- Track new loan application approvals and denials by region, branch, and loan officer.

### Actionable Insights

Real-time member relationship analytics and marketing opportunity lists.

- Loans and deposits maturing in 7, 14, 30.
- New products post member account opening.
- Product matrix to identify the 'next best' product.
- Top L&D accounts and customers by product, branch, and loan officer.
- Past due loans and accounts by days past.

## About BankBI

Since 2013, we've been on a mission to alleviate pressure on financial institutions across the globe. How? By harnessing the power of automation to remove laborious, manual work from your day and give you access to accurate real-time business insights.

We now have over 60 customers in over 40 countries who have discovered a better way to manage financial performance with BankBI.

"We know with BankBI that we will be able to get to a point where we have both financial and loan & deposit analysis delivered in an automated, efficient way."

**Dennis R. Bauer**

**Ideal Credit Union**