

# Successful Partnership Modernizes Data Infrastructure and Accomplishes Goals



ENABLING CHAFFEY'S MANAGEMENT TO PRIORITIZE THEIR STRATEGY FOR GROWTH WHILE PROBRIDGE'S TECH EXPERTS MANAGED DATA.

## Background:

### Infrastructure Restraints Required an Efficient Partner

Chaffey Federal Credit Union is a \$230M credit union in San Bernadino County, California, serving 12K members since 1964. Chaffey required insightful data about their members to better expand their member activity while maintaining growth at a managed pace. Infrastructure restraints meant Chaffey required a partner who could efficiently manage their data, dashboards and monthly reporting, as well as provide the required expertise analysis to recommend beneficial campaign details and analysis programs, without adding the cost and burden of additional servers and in-house staff time.

### Chaffey Federal Credit Union

SAN BERNADINO COUNTY,  
CALIFORNIA

12K  
members

\$230M  
in assets

## Goal:

### Prioritize Strategy for Growth

ProBridge's staff of tech experts managed Chaffey's data which allowed Chaffey's management to prioritize their strategy for growth. The Chaffey management team benefited from the additional analysis information tailored to provide membership insights and successful initiatives provided by the wide array of dashboards and monthly reporting supplied by the ProBridge team.

### KEY STEPS IN THE DATA SOLUTION

**Data Management:** ProBridge managed the multiple years of data provided by Chaffey to feed the analytics projects and dashboards.

**Client Database:** The comprehensive database contained details, transactional history and daily actions.

**Dashboards:** The comprehensive dashboards covered each facet of membership, product and branch activity.

**Membership Analysis:** Specific analysis including persona identification, migration and recommendations were provided over multiple years. This analysis provided management with unique insight into those members poised to leave, most engaged and in-between. By focusing on the persona, marketing identified who best to connect and cultivate an intentional marketing plan.

**Credit Card Portfolio:** Product improvements provided the opportunity to increase loan credit limits, which provided a good increase in overall portfolio performance.

**PowerBI Utilized:** Dashboards were created using PowerBI, which provided an easy environment for management to utilize data in decision-making.

**Testing & Validation:** Data integrity, performance improvements and user acceptance were tested and validated at every step of the process.

# Results:

## Increased Credit Card Usage for a Sustained Period

Following the successful implementation, Chaffey realized **significant improvements** in data accessibility, performance and scalability:



### Seamless Business Continuity

The dashboards ensured access to critical information and reports.



### Scalability & Flexibility

Having the outsourced data infrastructure allowed Chaffey to focus internal staff to utilize the data instead of redirecting into production.



### Data Science Approach

The utilization of data science techniques ensured that Chaffey had the analysis needed for action.

## Conclusion:

By partnering with **ProBridge**, Chaffey Credit Union successfully **modernized its data infrastructure and gained the business knowledge needed to accomplish goals**. Through ProBridge, Chaffey was able to deploy the benefits of data science techniques, providing credit limit increases and the creation of management dashboards while also providing data analysis on membership and growth metrics to the Chaffey management team.



Dashboard Examples

**ABOUT PROBRIDGE** ProBridge is a specialized talent services provider that seamlessly integrates their top-tier talent into existing teams. ProBridge's bench of talented tech and other industry professionals are ready and able to provide the expertise and skills needed to scale efficiently and achieve business objectives. As your partner in growth, ProBridge can help your organization be as productive and cost effective as possible, allowing you to create more value for your clients. Learn more at [ProBridgeServices.com](https://ProBridgeServices.com).

