Saving Time and Streamlining Efficiency with Self-Serve Analytics

Financial Center First Credit Union embraced the Trellance Data Warehouse platform, establishing a single source of truth with daily updates that streamlined decision-making and success tracking.

BACKGROUND:

Overcoming Data Silos

Financial Center First Credit Union (Financial Center), a $880 million asset credit union with over 63,000 members, needed a more efficient way to access accurate data for decision-making and member promotion tracking. They partnered with Trellance to implement their Data Warehouse platform, providing daily data tracking and customizable dashboards for easy visualization of key performance metrics.

OPPORTUNITY:

Monitoring a New Branch and Aiding in Rate Planning

While the Data Warehouse enabled comprehensive tracking of Financial Center's data, two specific projects benefitted from its customizable dashboards: monitoring the success of a new branch and planning ongoing rate adjustments.

New Branch

Financial Center opened a new branch five miles from the nearest location in an affluent neighborhood. To track its performance closely, they developed a custom dashboard that provided daily insights into the branch's activity.

Rate Planning

Financial Center's Share Certificate program saw heightened interest due to recent interest rate changes. The credit union used the Data Warehouse to track Certificate maturities and monitor where funds went post-maturity. A custom dashboard provided up-to-date information during weekly meetings, enabling them to adjust rates in response to member behavior.

Financial Center First Credit Union
INDIANAPOLIS, IN

63K+
members

$880M
in assets

"The entire organization is now using the dashboards to assess the daily business performance, and even our CEO is using these dashboards every day. When your CEO used to be a CIO, you have high expectations. We appreciate that Trellance has been with us every step of the way."

Adrian Phillips,
AVP of Business Intelligence at Financial Center

OUTCOME:

Daily Tracking and Consistent Data Visualization

Before implementing the Data Warehouse, Financial Center reviewed data only once a month, often in inconsistent formats. Departments tracked information differently, relying on Excel spreadsheets or manual data transfers. The Data Warehouse centralized this data, providing a single, reliable source of truth and standardized reporting.

For the new branch, daily data allowed Financial Center to track new accounts and deposits as they came in, seeing $1 million in deposits within just one week. This rapid access to information was critical in assessing the branch's success.

In rate planning, the custom dashboard offered a clear view of Certificate maturities and where the funds went once cashed in. This insight helped Financial Center identify trends—such as member funds leaving for competitor institutions—and make timely rate adjustments to retain business.

$1M in deposits within just one week

daily metrics → **easy success monitoring** → **customizable dashboard for easy data visualization**

LOOKING AHEAD:

Financial Center plans to continue their partnership with Trellance in 2025, further leveraging the Data Warehouse platform as they explore new opportunities.

riseANALYTICS

A Trellance company