

Driven by Insights

Trellance M360 is the leading business analytics platform for credit unions serving over 6 million members and credit unions with over \$110 billion in total assets. M360 enables seamless integration with the data sources used by credit unions, providing a common data model to holistically analyze member behavior so you take the most appropriate actions and achieve your business goals. M360 allows you to increase efficiency, manage risk and enrich relationships with your members. Trellance M360 comes with a wide library of dashboards so the information you need is readily available to at all levels within your credit union.

Trellance M360 supports flexible deployment options, as it can be implemented via a price competitive cloud offering or “on-premises” to meet your specific credit union’s preference.

M360 Supports Your Business Needs



Create Personalized Member Experiences

Having your data in one platform allows you to easily compare accounts across your credit union. This enables your credit union to customize and personalize your member experiences and take your member relationships to



Quickly Review Your Loan Portfolio

Have all your loan data at your fingertips including outstanding loan amounts, interest rates, credit tiers and much more so you can identify opportunities and provide targeted solutions to members.



Monitor Employee & Branch Performance

Monitor associate workload and performance to make informed staffing and technology decisions.



Open Partner Ecosystem

M360 is an open platform that supports an ecosystem of certified partners ready to accelerate your credit union digital transformation. Learn more about the Trellance Partner Program and our partner solutions for data quality, marketing automation, text messaging, profitability, and



Improve Your Loan Origination and Collection Process

Improve the loan conversion rate and decrease loan decision and approval times. M360 allows you to understand the status of your loan applications and even helps you to improve your collections activities through our newly released Collections dashboards.



Drive Digital Member Engagement

Have the data required to meet member needs and increase loyalty as expectations have changed due to the pandemic and other technological improvements. Leverage M360 new Digital Banking dashboards to understand how your members are engaging with your credit union via your digital channels.

Ready to see how Trellance M360 can shape the way you do business?

Contact Trellance at info@trellance.com

Portfolio Growth Solutions



Strategy for Success

Credit unions need data-driven initiatives and solutions to add value to their members while growing their card portfolios in the rapidly evolving payments landscape. By working with Trellance experts, proven strategies can be implemented into your portfolio to boost member activation, retention, penetration, and usage.

The Solutions for You



Card Portfolio Growth Solutions

This 12-month calendar of events is designed to grow your credit card program. By offering ways to consolidate debt, bring new cards into your portfolio and keep existing cards top of wallet, your members will be engaged throughout the entire year.

Credit Line Increase Program

Increasing your cardholder's line of credit is one effective way to keep your card the primary on all accounts. Trellance provide an opportunity to aggregate increases so that more of your membership can receive the benefits of additional spend.



New Accounts Acquisition Program

Your membership is receiving credit card offers all the time, but what they want is to work with their trusted credit union. Trellance makes pre-qualification easy and helps you convert members into cardholder. This allows you to compete, and win, against the big guys.

Auto Refinance Program

Strengthen your member relationships by providing opportunities for them to save money. Trellance's Auto Refinance Program allows credit unions to recapture business and bring loans in house by offering better terms and rates than the competition.



Time for Results

Now is the time to put emphasis on your portfolio and kick-start growth at your credit union. The Trellance team of experts is ready to guide you with best practices and ensure that you can grow your business strategically.

Ready to see how Portfolio Growth Solutions can support your credit union?

Contact Trellance at info@trellance.com

Predicting the Future

Trellance Predictive Analytics solutions offer credit union decision makers the insights to capitalize on future trends and proactively respond to challenges. Harness big data to define actions to reduce risk, improve efficiency, increase member satisfaction, and grow revenue.

Trellance Predictive Analytics models empower credit unions to get a holistic view of your membership based on behavioral data so you can create marketing campaigns to targeted member segments at your credit union.

Our team of credit union focused data scientists are ready to deploy machine learning packages through our cloud offering or “on-premises” so you can scale personalized insights at your credit union.

Is your credit union ready to transform your analytics and take it to the next level?

How Predictive Analytics Can Shape Your Business



Member Personas

The Member Personas predictive model provides added context around your members. Each member is classified into one persona group. Each group's characteristics can be used to drive specific marketing actions to improve your member retention programs and boost the efficiency of your marketing campaigns.



Next Best Product

The Next Best Product predictive model enables you to identify the next two most beneficial products for every member of your credit union based on historical behaviors. This model has many benefits such as a better match between the member's needs and a quantifiable increase in member satisfaction and engagement.



Attrition Prediction

The Attrition predictive model enables your credit union to identify members that are at risk of leaving based on actual member's activities. This model helps the credit unions take a targeted approach and work with "high risk" member groups allowing you to deploy more effective marketing campaigns.

Future Models

Trellance is adding to our portfolio of predictive models and incorporating 3rd party data to help you expand your existing member base. New planned models include:



Market Share

Using 3rd party data this model enables credit unions to analyze their membership revealing which areas present the greatest opportunity for new



Householding

This model groups multiple related members into the same household, so the credit union can drive marketing campaigns addressing the entire household and not just single individuals. This model enables a more complete understanding of

Ready to see how Trellance Predictive Analytics can shape the way you do business?

Trellance CUCompare



Compare with Confidence

Trellance CUCompare is a web-based, easy to use, descriptive analytics solution which provides credit unions a way to benchmark and track performance through national, state, and asset-band peer comparisons. CUCompare runs on data obtained from NCUA on all federally insured credit unions and from FDIC on commercial banks. With CUCompare you can assess a wide range of pre-defined and fully customizable performance metrics across a variety of peer logics, making CUCompare the most cost efficient, flexible, and desirable solution among the available benchmarking solutions.

Compare Your Own Way



Greater Flexibility

CU Compare offers a great deal of flexibility as it allows comparison both at national, state, and on asset-band basis. CUCompare supports the ability to analyze and compare your credit union performance by any of the more than 140 performance metrics tracked in the system including the recently developed digital adoption score.

Trending Analysis

CU Compare supports the ability to forecast actual data for up to four years in the future, helping the credit union to better understand and visualize your future performance trends.



Banking Comparison

CUCompare contains unique capabilities that help credit unions to compete with other financial institutions operating in the same service area. The Bank Comparison feature allows the credit union to benchmark your performance KPIs with user-selected banking institutions enabling a more precise situational awareness for credit unions.

Branch Clustering

CUCompare branch clustering feature allows credit unions to analyze the branch footprint of banking institutions within a current or desired service area, down to the zip code level. A branch density index calculates the population per branch by comparing the area population against the total number of financial institutions in the area. Using the data, credit unions making strategic branch opening decisions can assess which locations may be potentially underserved.



One Solution, Multiple Benefits

Do you want to harness the power of your data for more effective decision-making?

Contact Trellance at info@trellance.com



Trellance Augmented Data Quality Solution Powered by DQLabs



An Established Trellance Partner

DQLabs, a Trellance Solution Extension Partner, is one of the leading Augmented Data Quality solution providers with experience across several industries including financial services. DQLabs has received multiple key recognitions and awards such as the Gartner Mention, Forbes Technology Council, TiE50 Winner, Databricks & Microsoft Azure Partner.



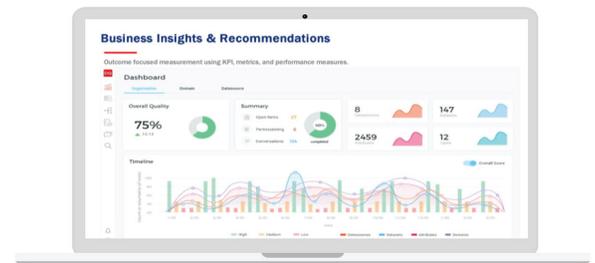
Augmented data quality uses machine learning and automation to help meet the challenge of managing trusted, high-quality data at scale.

Quality is Key

Trellance Augmented Data Quality Solution is a product designed to enhance your data outcomes. By leveraging AI technology, the solution is able to review and measure the quality of your data while capturing inconsistencies and errors. This significantly improves the quality of your data and leads to more confident business decisions for your credit union.

This solution supports flexible deployment options and can be implemented with our price competitive M360 cloud offering or “on-premises” variation to meet your credit union’s preference.

Trellance Augmented Data Quality Solution has one simple goal: 100% accuracy of your Credit Union data.



Actionable Data Quality Platform



Connects to M360 Cloud and M360 on-premise platforms



Includes automated data catalogue and semantic discovery



Incorporates credit-union-specific rules and dashboards



Leverages AI technology, to scan and measure data quality while capturing errors, inaccuracies and inconsistencies

Decisions You Can Count On

Having access to high quality data sets your credit union apart by allowing a richer member experience through clear decision making. Other benefits offered by Trellance Augmented Data Quality Solution include:



Decreased time and cost through automation of manually intensive data quality processes



Reduced maintenance by data stewards via self-learning platform and visual interactions



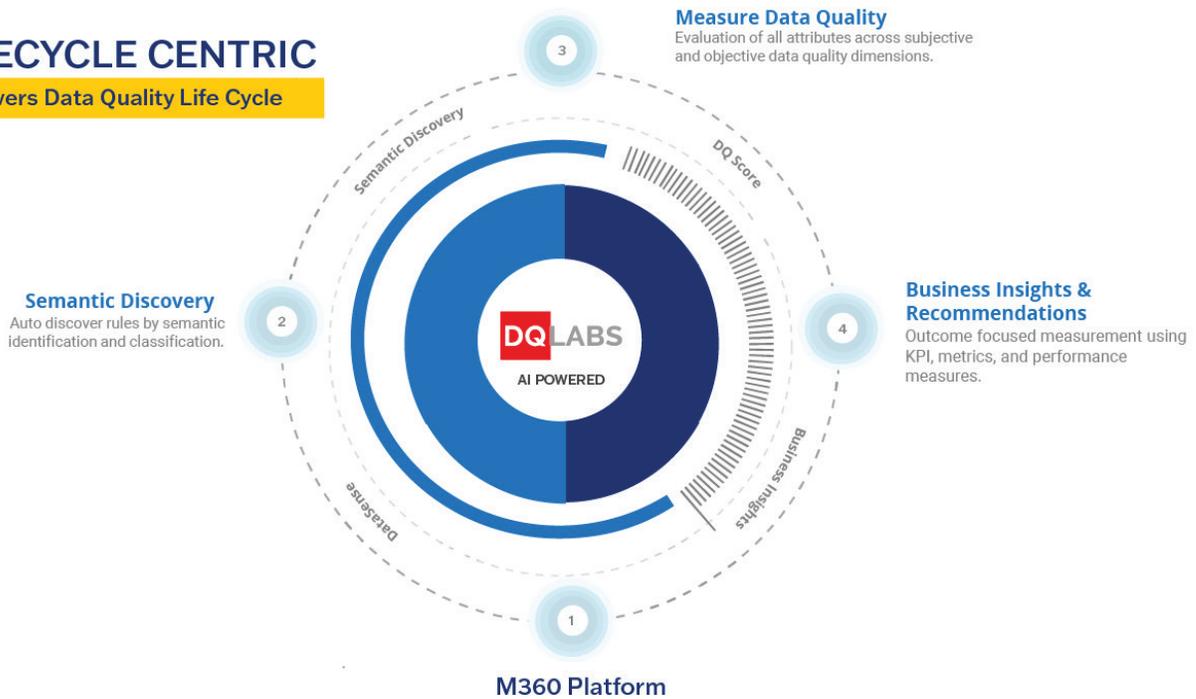
Improved reporting and planning processes due to the search and discover capabilities



Deeper data quality insights resulting in more confident decisions

LIFECYCLE CENTRIC

Covers Data Quality Life Cycle



Ready to see how Trellance Augmented Data Quality can improve your credit union performance?

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