



Success Credit Union

New Member Engagement Scorecard

New Memberships Opened between: 1/1/2022 - 6/30/2022 Analyzed as of: 8/31/2022

8/31/2022 Membership Summary

CU*BASE Memberships:	6,081
Mbrs w/ Written Off Loan:	0
Dormant Members:	411
Net Active Membership:	5,670
000 Base Share Only:	2,371
Mbrs w/ Negative Share:	106
Mbrs below \$10.00 Par	77

New Member Stats: 1/1/2022 - 6/30/2022

New Memberships Opened:	277
Individuals	270
Organizational	7
New Memberships Closed:	69
New Membership Retention:	75.09%
New Member Average Age:	37.08

New Member, Accounts Opened (active only)

Share Accounts	213	57%
Checking Accounts	87	23%
Certificate Accounts	1	0%
Escrow Accounts	0	0%
Closed End Loans	66	18%
Open End Loans	5	1%

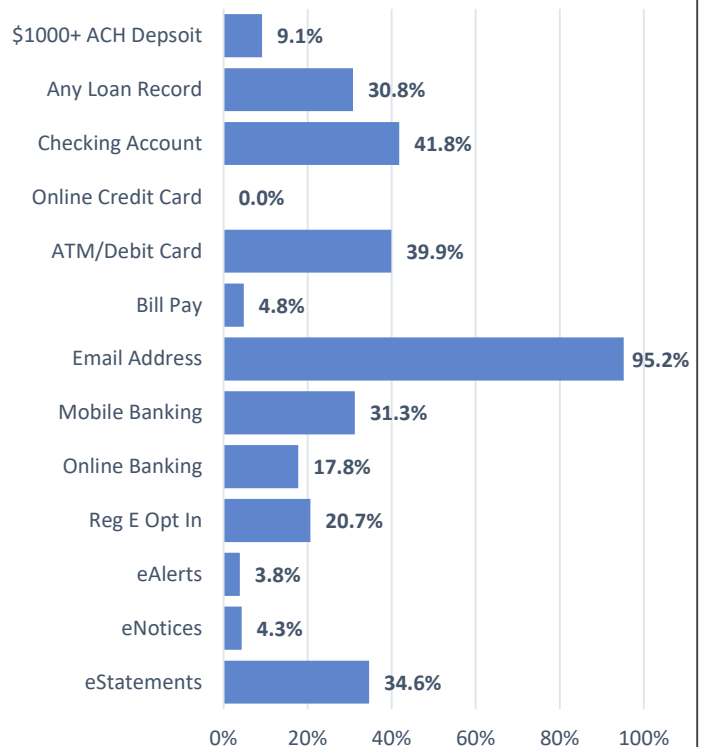
New Member, Account Balances (active only)

Share Accounts	\$279,859	13%
Checking Accounts	\$100,978	5%
Certificate Accounts	\$200	0%
Escrow Accounts	\$0	0%
Closed End Loans	\$1,600,497	77%
Open End Loans	\$102,859	5%

New Members, Opened By Employee

Online Banking	84	41%
Employee Name #1	25	12%
Employee Name #2	23	11%
Employee Name #3	20	10%
Employee Name #4	17	8%
Other	38	18%

New Member, Products and Services



Product and Service Penetration

	New Mbrs	All Mbrs
eStatements	34.6%	43.1%
eNotices	4.3%	2.5%
eAlerts	3.8%	5.1%
Reg E Opt In	20.7%	18.8%
Online Banking, 30 Days	17.8%	21.7%
Mobile Banking, 30 Days	31.3%	24.4%
Email Address	95.2%	78.8%
Bill Pay	4.8%	9.5%
ATM/Debit Card	39.9%	36.8%
Online Credit Card	0.0%	0.0%
Checking Account	41.8%	46.9%
Any Loan Record	30.8%	15.5%
\$1000+ ACH Deposit	9.1%	28.0%

New Member, Age Distribution

Individuals, 0 - 17	27	13%
Individuals, 18 - 30	43	21%
Individuals, 31 - 40	46	23%
Individuals, 41 - 50	42	21%
Individuals, 51 - 60	20	10%
Individuals, 61+	24	12%
Organizational Members	6	3%

New Member, Branch Allocation (Top 3)

MAIN OFFICE	109	52%
BRANCH #2	91	44%
BRANCH #3	8	4%
Other	0	0%

New Membership Open Reason Codes

HOME BANKING	84	40%
NEW-REFERRED BY FAMILY	56	27%
NEW-PREVIOUS MEMBER	17	8%
NEW-REFERRED BY FRIEND	17	8%
NEW-INTERNET SEARCH	13	6%
Other	21	10%

New Account Open Reason Codes

HOME BANKING	89	42%
NEW-REFERRED BY FAMILY	56	27%
NEW-PREVIOUS MEMBER	17	8%
NEW-REFERRED BY FRIEND	17	8%
NEW-INTERNET SEARCH	12	6%
Other	20	9%

New Member, Member Designations

Individual	200	96%
LLC	5	2%
Guardianship	1	0%
Trust	1	0%
Estate	1	0%
Other	0	0%

Product Type Penetration Comparison

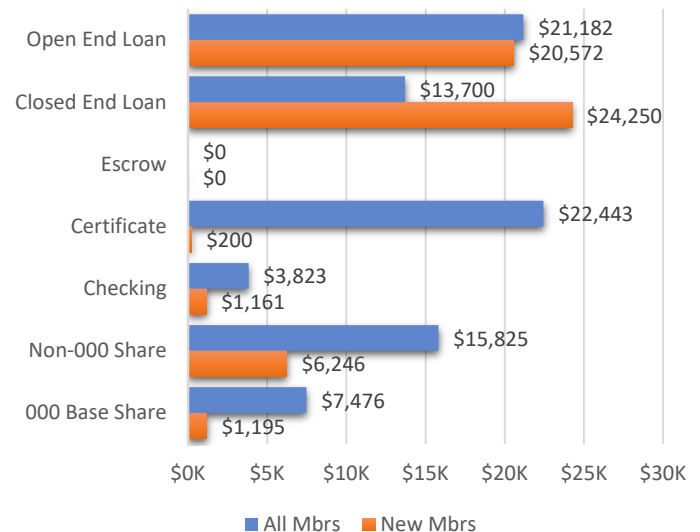
	New Mbrs	All Mbrs
Non-000 Share	2.4%	16.4%
Checking	41.8%	46.9%
Certificate	0.5%	3.7%
Escrow	0.0%	0.0%
Closed End Loan	29.8%	14.6%
Open End Loan	2.4%	1.3%

Product Average Balance Comparison

	New Mbrs	All Mbrs
000 Base Share	\$1,195	\$7,476
Non-000 Share	\$6,246	\$15,825
Checking	\$1,161	\$3,823
Certificate	\$200	\$22,443
Escrow	\$0	\$0
Closed End Loan	\$24,250	\$13,700
Open End Loan	\$20,572	\$21,182

Average Balance Comparison

New vs All Members


The Data Warehouse is Available

A brand-new feature for storing the data you always wished you had in CU*BASE!

Upload new information from any outside source (vendor reports, email platforms) for storage or analysis.

Collect the special data set called Phone Optics for deeper analysis studies.

And much more!