D.A.R.E.®

MICHIGAN CREDIT UNION LEAGUE
GAME ON!
ACE26
GRAND RAPIDS, MI
JUNE 2 - 4

Dashboard Abuse Resistance Education

Maggie Chopp, Director of Business Development

Wednesday, June 3
3:45 – 4:30 pm

Sponsored By: Gemineye

About Your Speaker

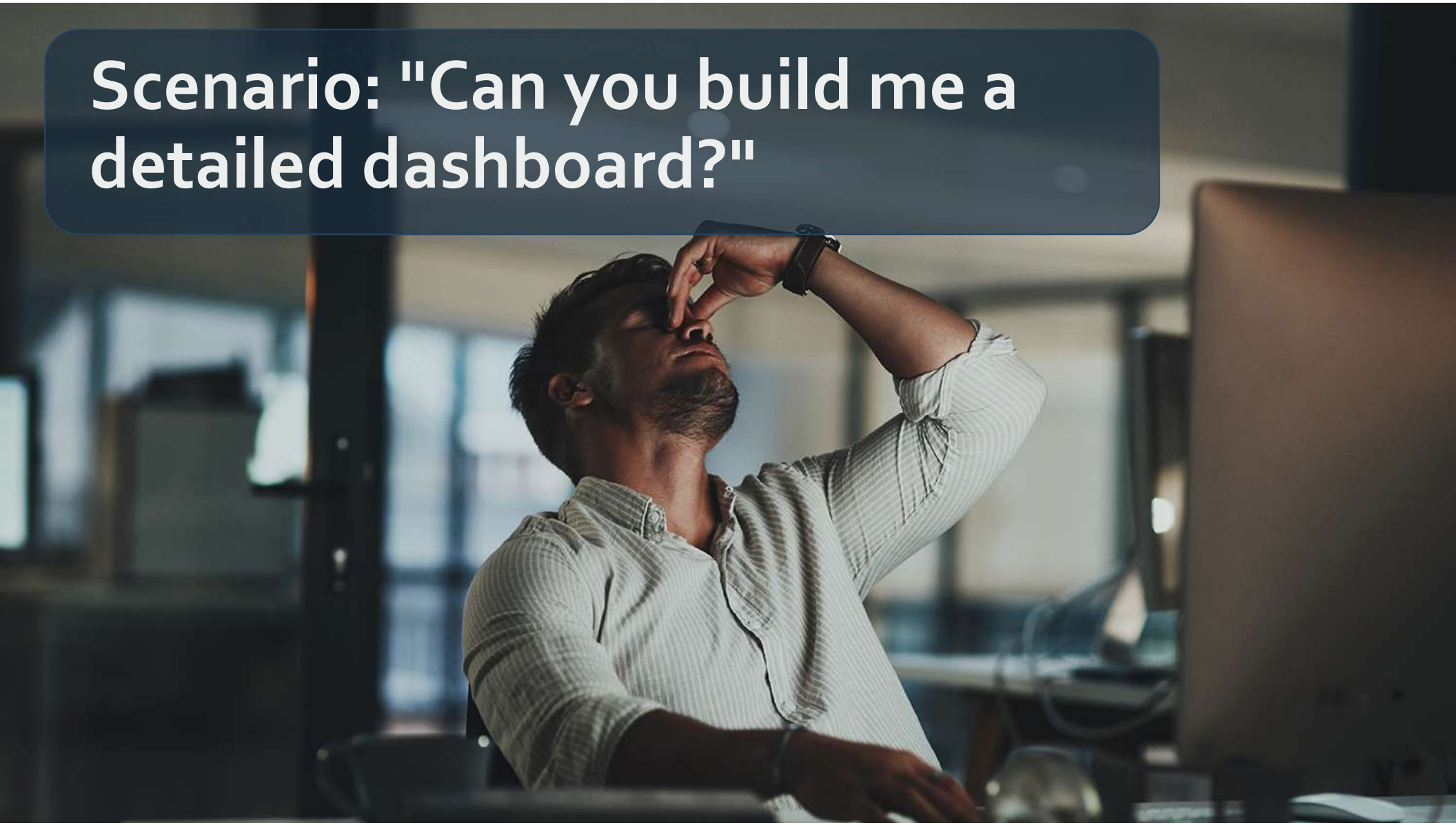
Maggie Chopp
Director of Business Development at Gemineye



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Modern Data Platform Provider for Credit Unions

Scenario: "Can you build me a detailed dashboard?"



Laying Some Groundwork

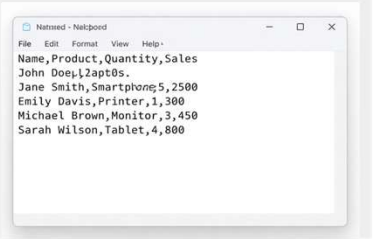
Sources

- Core
- LOS
- Online Banking
- General Ledger
- Other Sources

Data Warehouse

Consumption Layer

Data Extracts



Tabular Reports



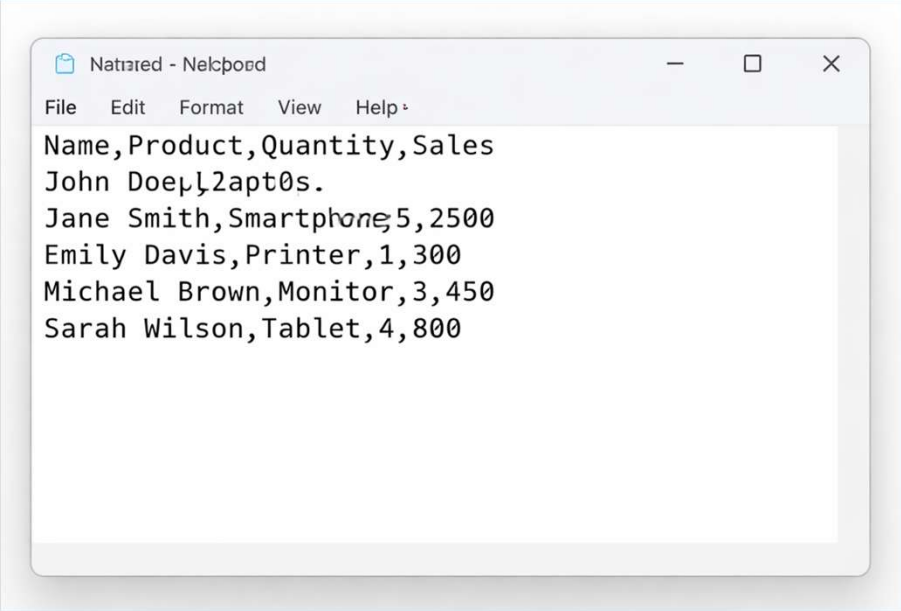
Dashboards



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Data Extracts

- Best for operational functions (vendor deliveries, data loads to ancillary systems, etc.)
- Optimizes for files size and encryption
- Raw data only
- Flexible and integrates with other tools



Tabular Reports

- Best for structured recurring reporting
- Clear, consistent, and easy to distribute
- Low complexity for operational teams
- Limited exploration and flexibility
- Difficult to do trending analysis



Monthly Sales Report

Name	Product	Quantity	Sales
John Doe	Laptop	2	$1,500
Jane Smith	Smartphone	5	$2,500
Emily Davis	Printer	1	$300
Michael Brown	Monitor	3	$450
Sarah Wilson	Tablet	4	$800

Dashboards

- Best for monitoring performance and KPIs
- Interactive exploration of metrics
- Supports operational and executive visibility
- Requires governance and maintenance



The Hidden Cost of the Wrong Delivery Method

- Over-engineered dashboards for simple reports
- Manual spreadsheet requests repeated weekly
- Data teams becoming reporting factories
- Slow decisions and low adoption
- Dashboards built but rarely used
- Decision makers waiting too long for answers

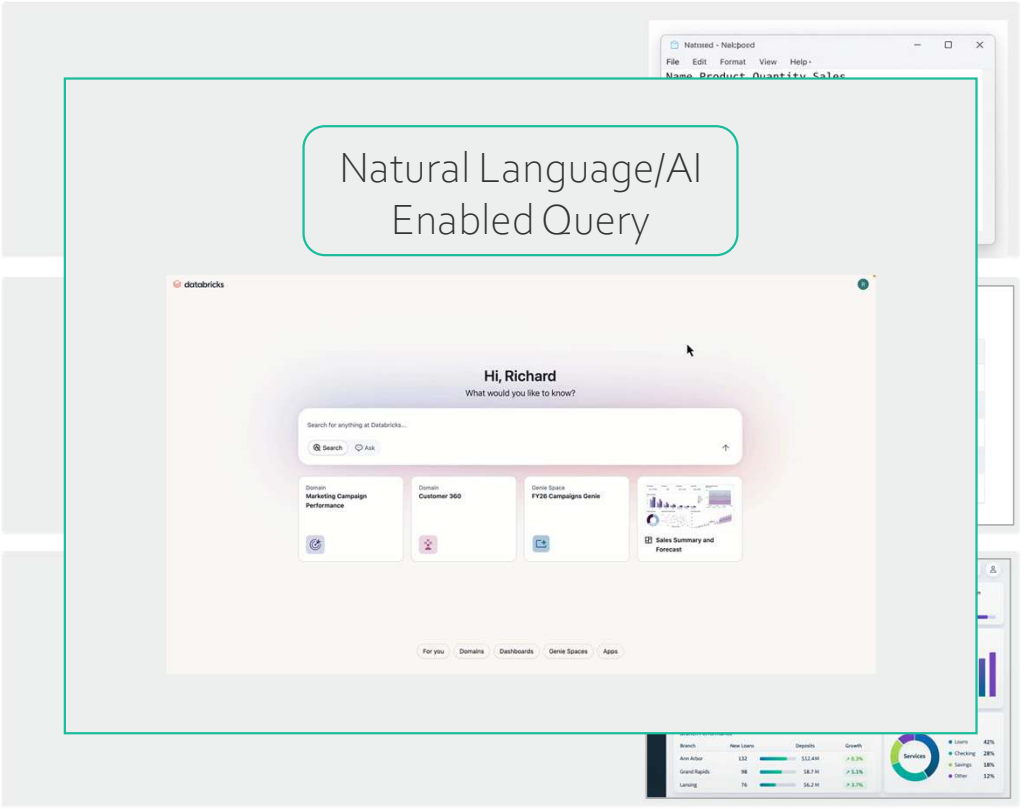
The Model Ripe for Change

Consumption Layer

Sources

- Core
- LOS
- Online Banking
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- Other Sources

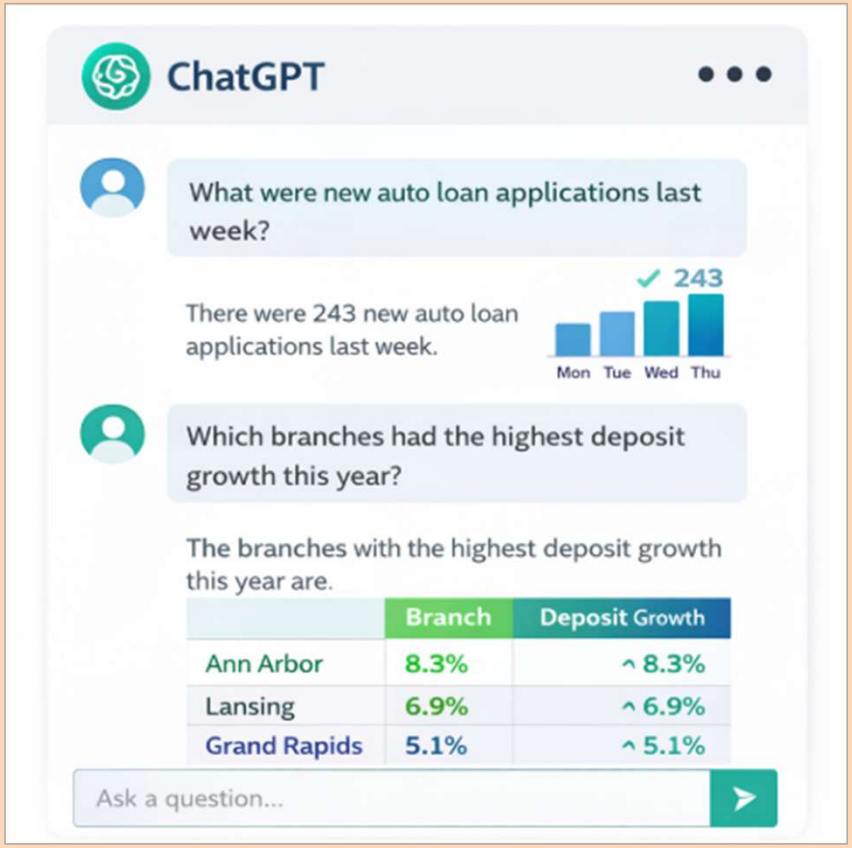
Data Warehouse

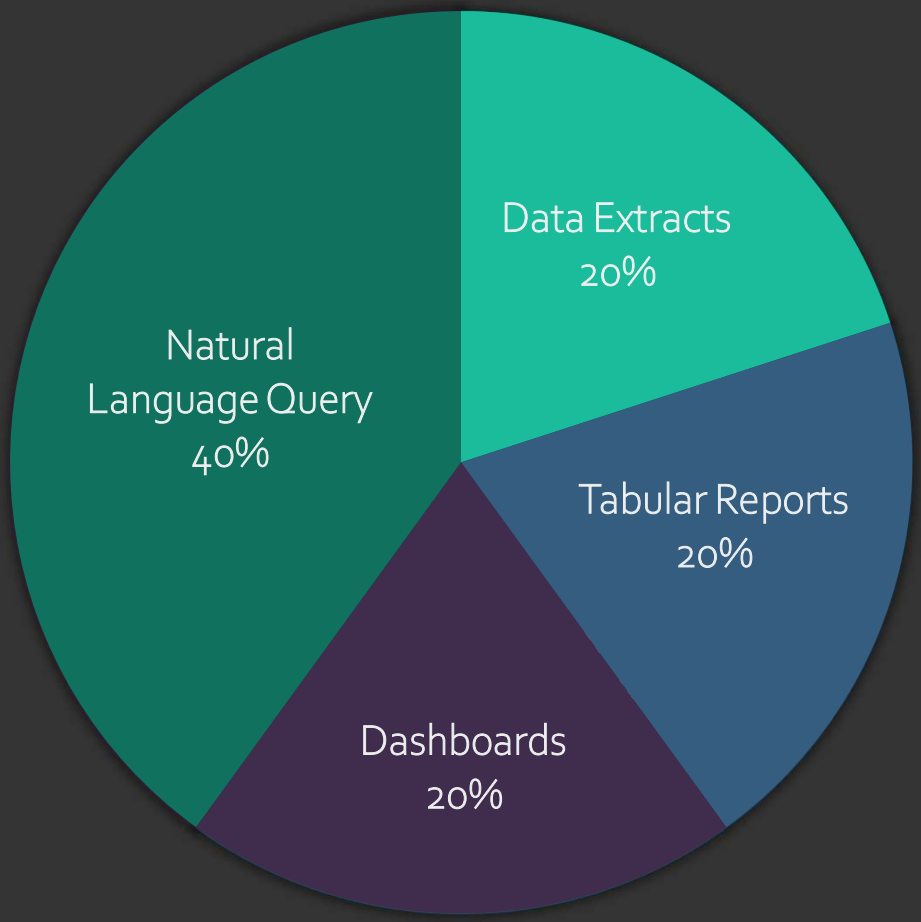


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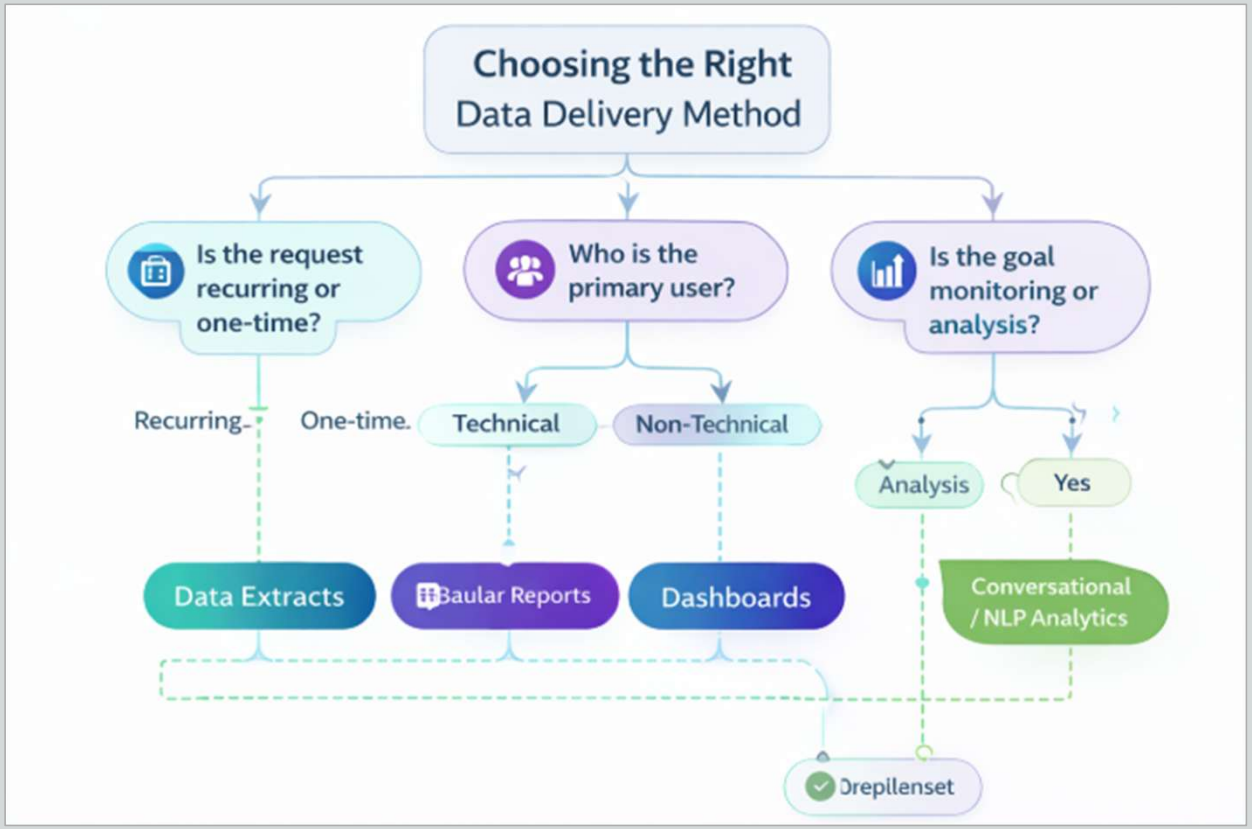
Conversational / NLP Analytics

- Allows users to ask questions in natural language
- Reduces reliance on analysts
- Enables fast answers for ad-hoc questions
- Best when supported by well-modeled data



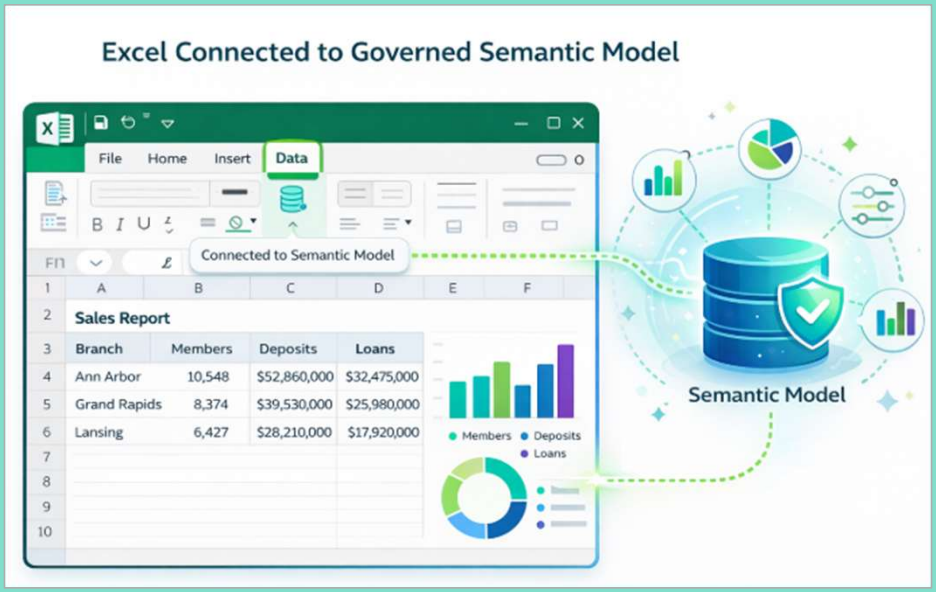

Data Extracts
20%
Tabular Reports
20%
Dashboards
20%
Natural
Language Query
40%

Framework: Choosing the Right Delivery Method



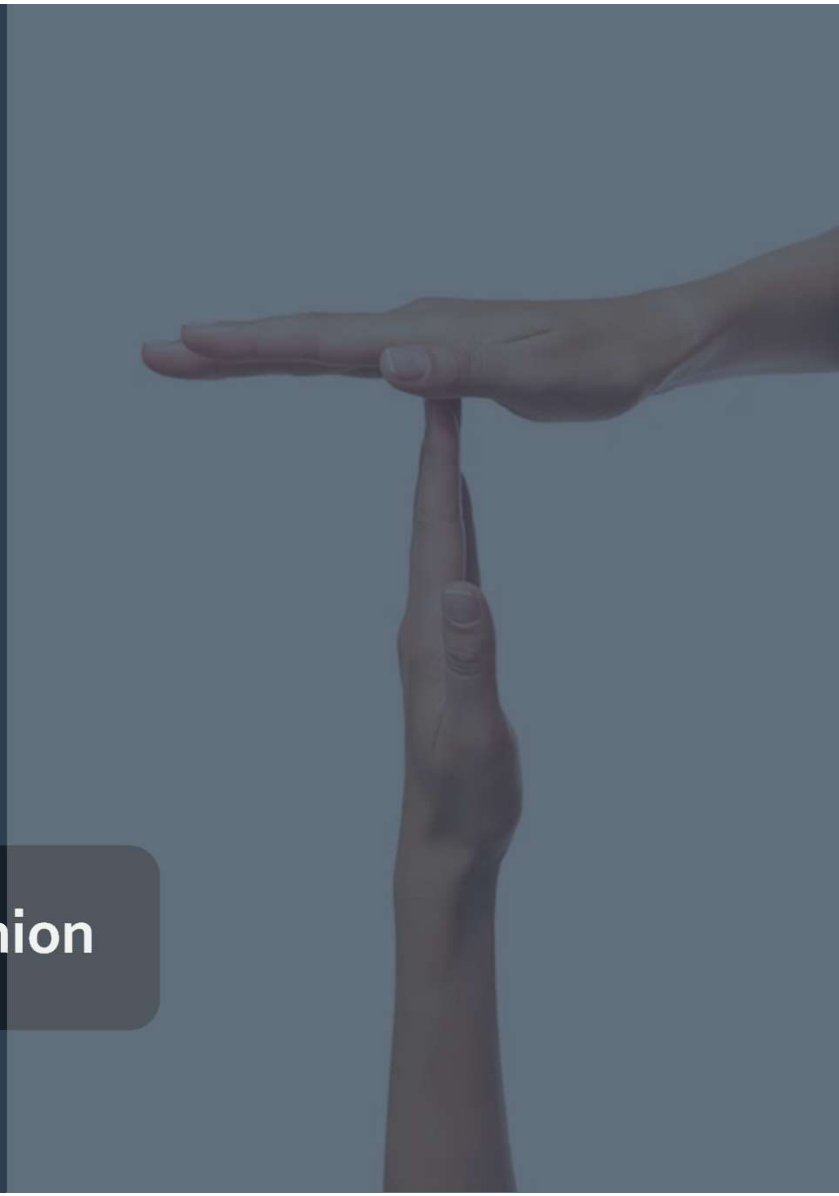
Self-Service – The Gold Standard

- Best for teams with tightly governed data models
- Self-directed report/analysis creation
- Supports business team independence
- Requires up-front investment from data teams to deliver means for self-service



Q&A

Introduce with your name and credit union



What High-Performing Credit Unions Do

1. Manage a Single Governed Semantic Layer
2. Regularly Inventory and Retire Digital Assets
3. Maximize Self-Service Data Exploration
4. Have a documented framework for deciding consumption methodology
5. Have a data strategy roadmap that includes AI/NL Query



Key Takeaway

- Great data teams don't just deliver data
- They design systems for delivering answers
- Match the delivery method to the business need
- The result: faster decisions and greater impact



Final Thoughts


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From **Impossible** to **Empowered**.