



GROWING TOGETHER

**VISIFI CUSTOMER
CONFERENCE 2022**

Leveraging a Data Ecosystem



Meet the presenter



Jeanie Richardson

Technical Director of Data Applications and AI

VisiFI

Jeanie currently leads Data Applications and AI at VisiFI and has been with the in the credit union industry for 22 years, with most of her career focused on data.

Data as the Fuel to Drive Growth

Overall Data Ecosystem Components

- Technology - Database Models
- Machine Learning - AI
- Presentation - Visualization

Goals for Successful Strategy and Implementation

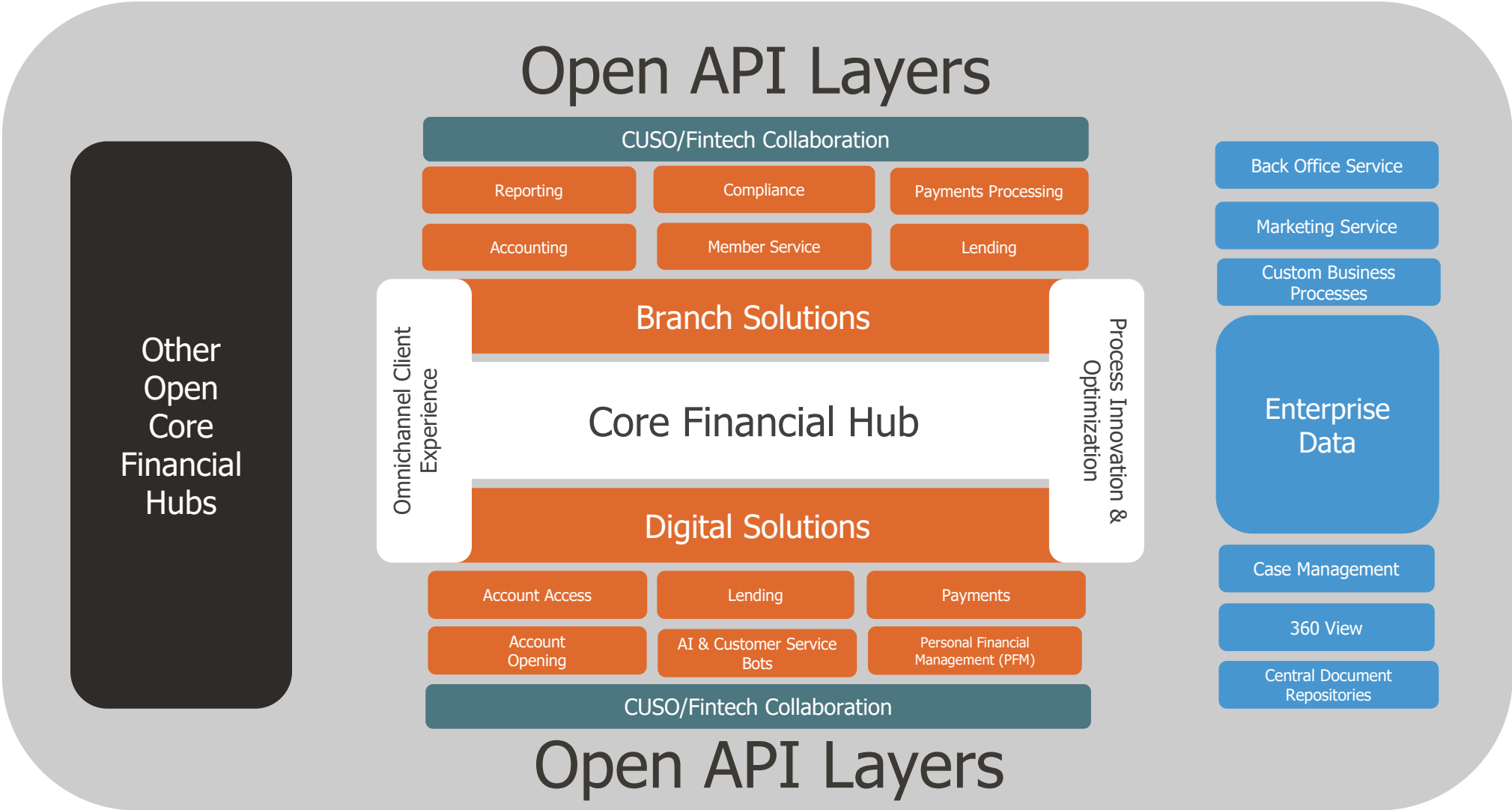
- Enable Innovation
- Value Creation
- Support Long-Term Goals



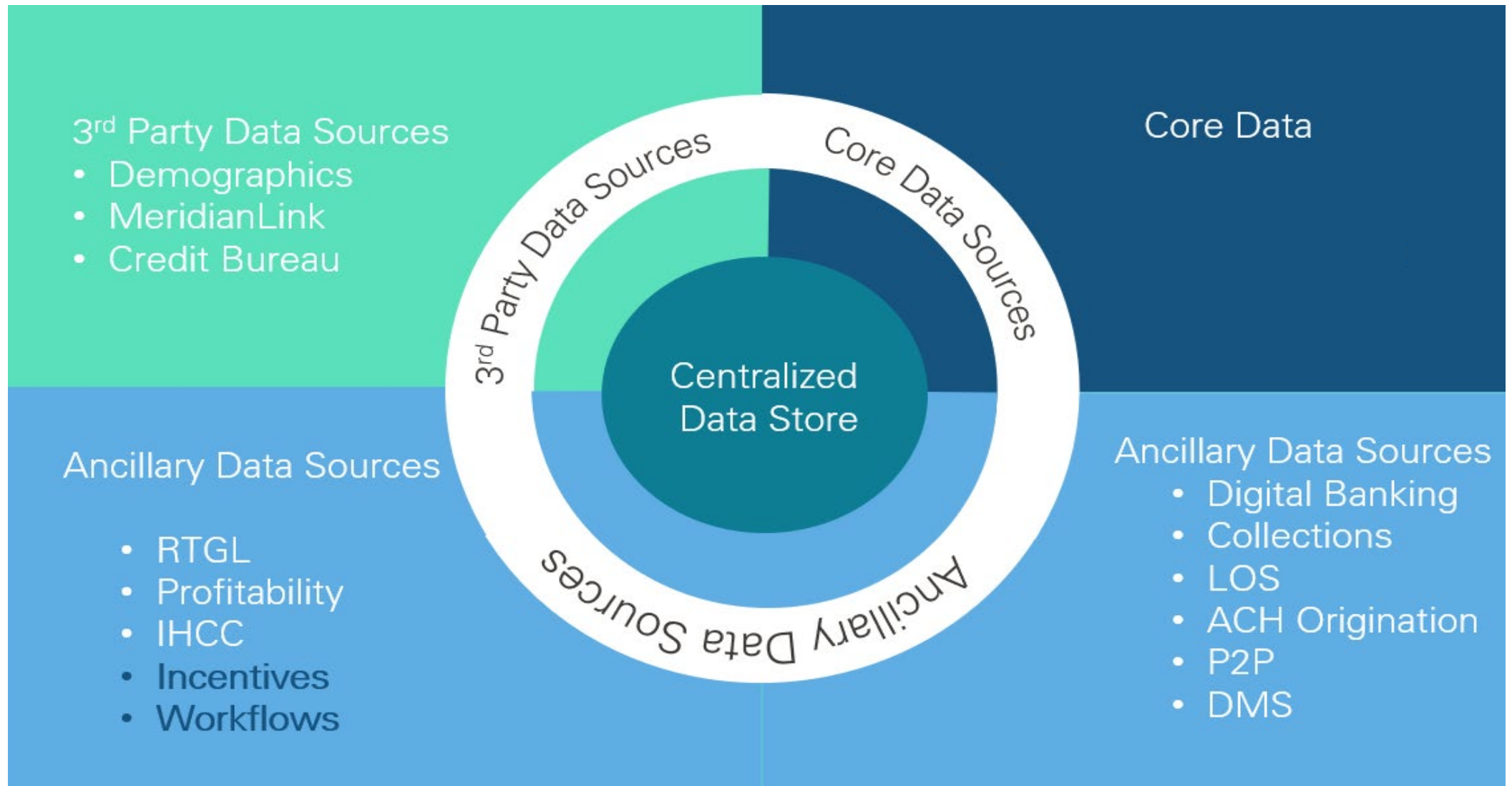
Accelerating analytics and data science in the era of data-driven business models



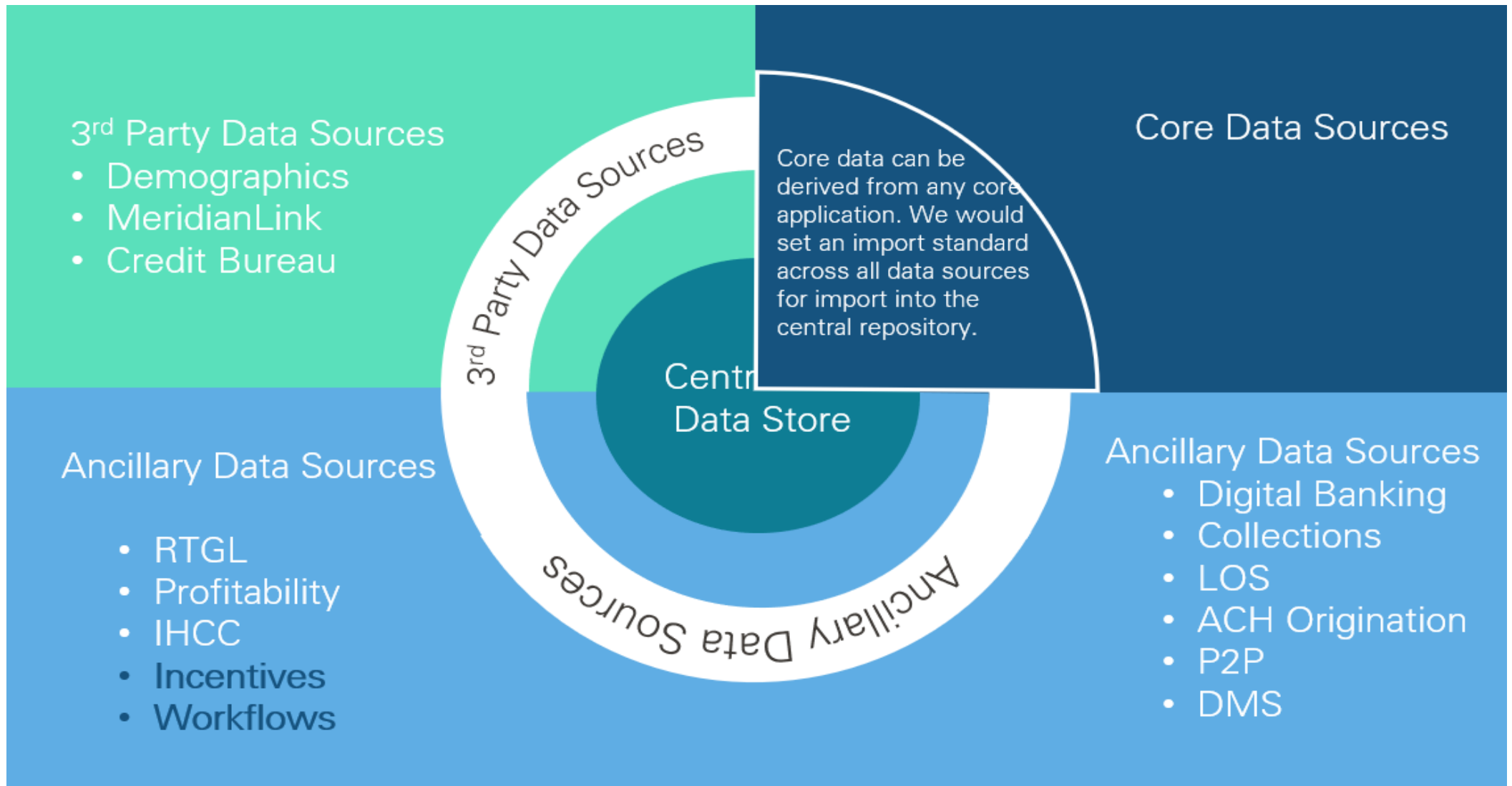
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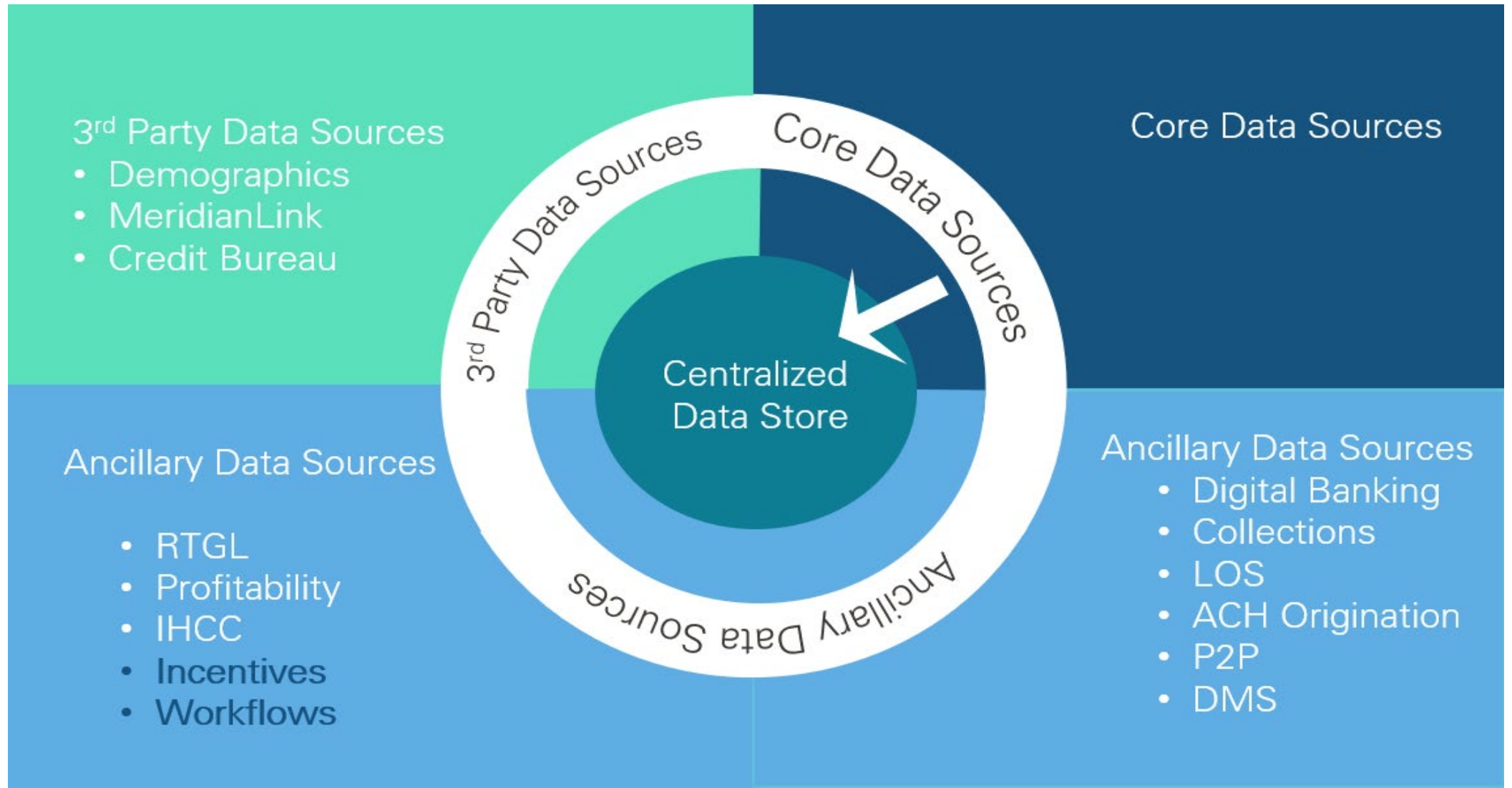
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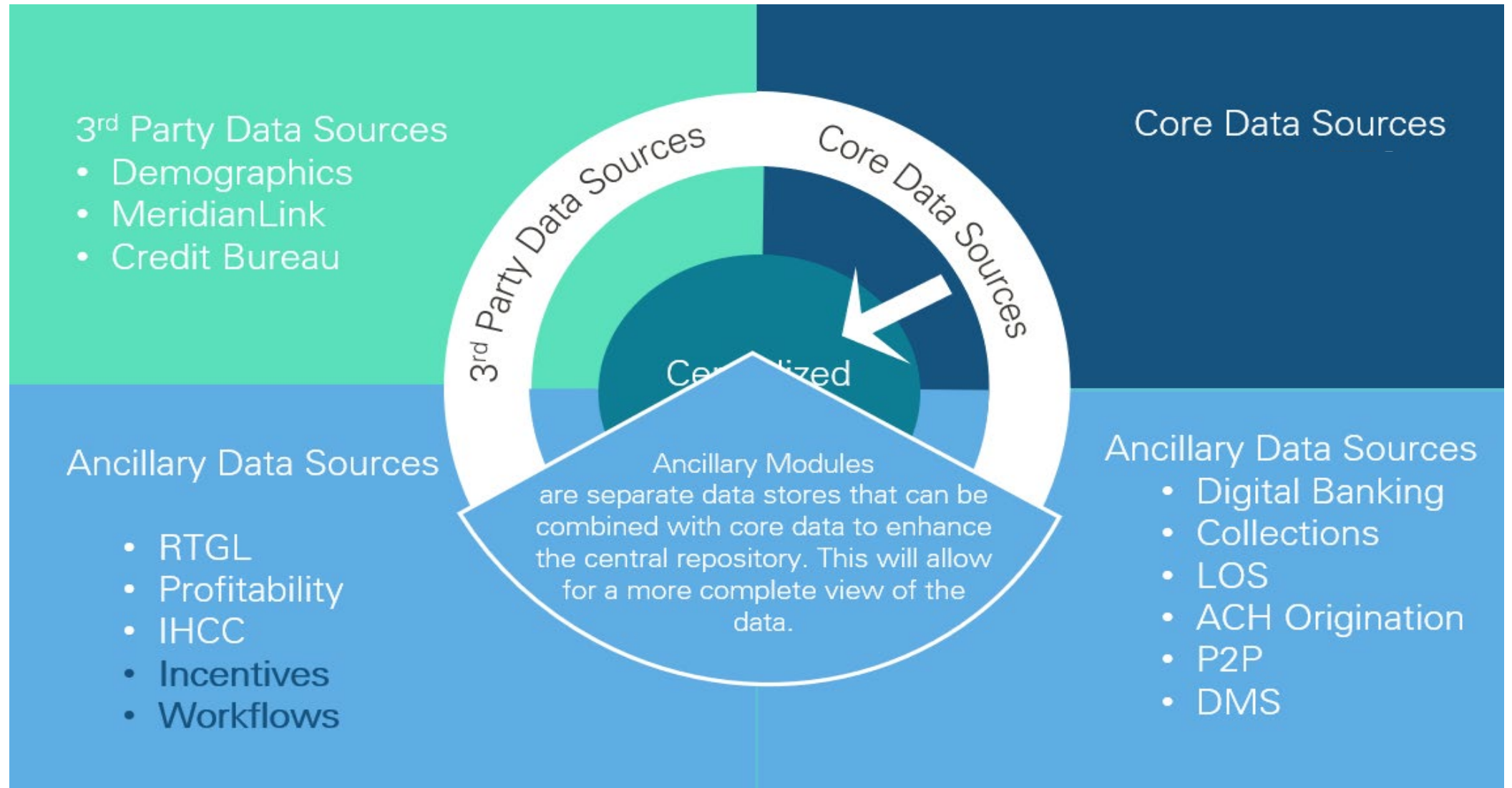
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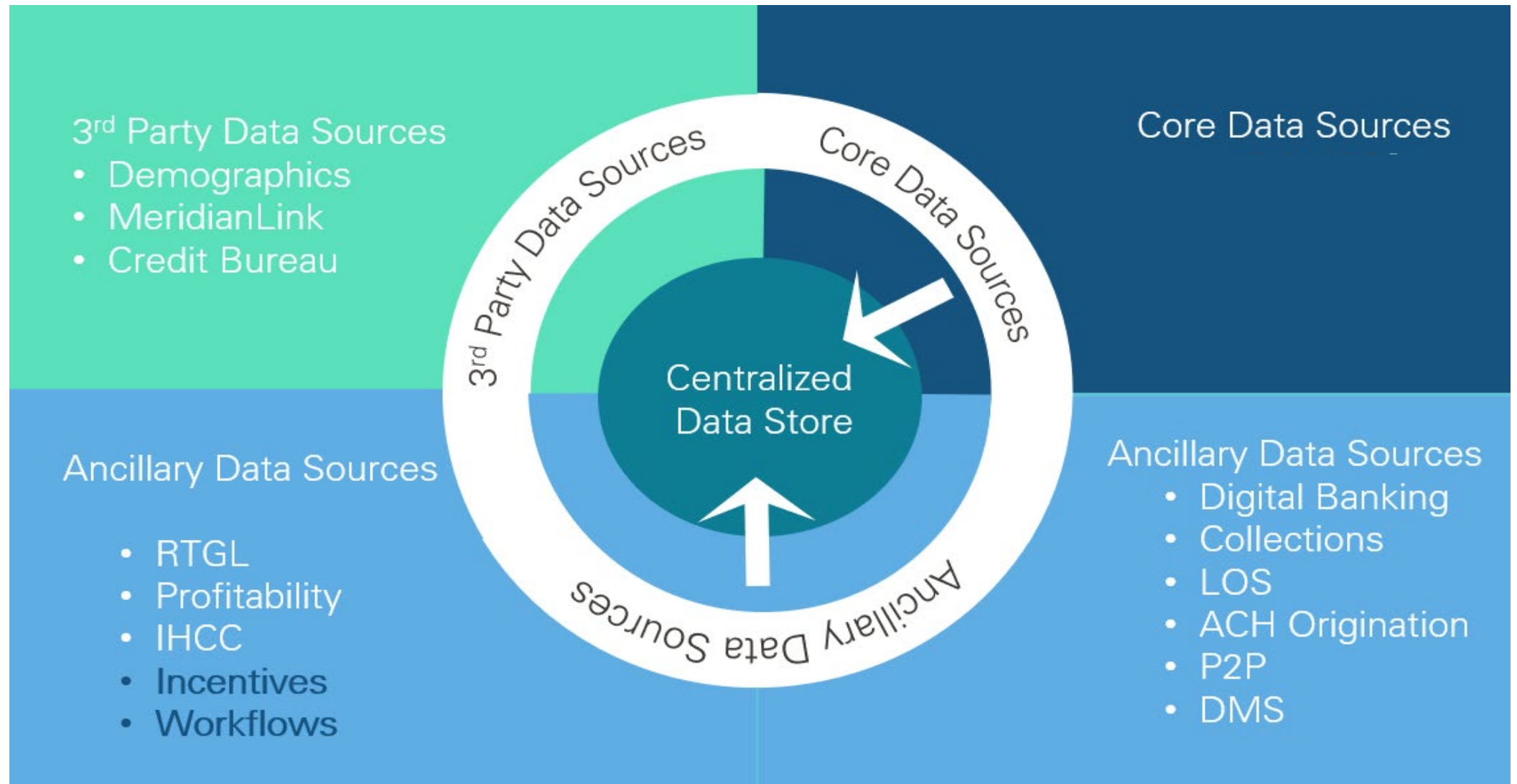
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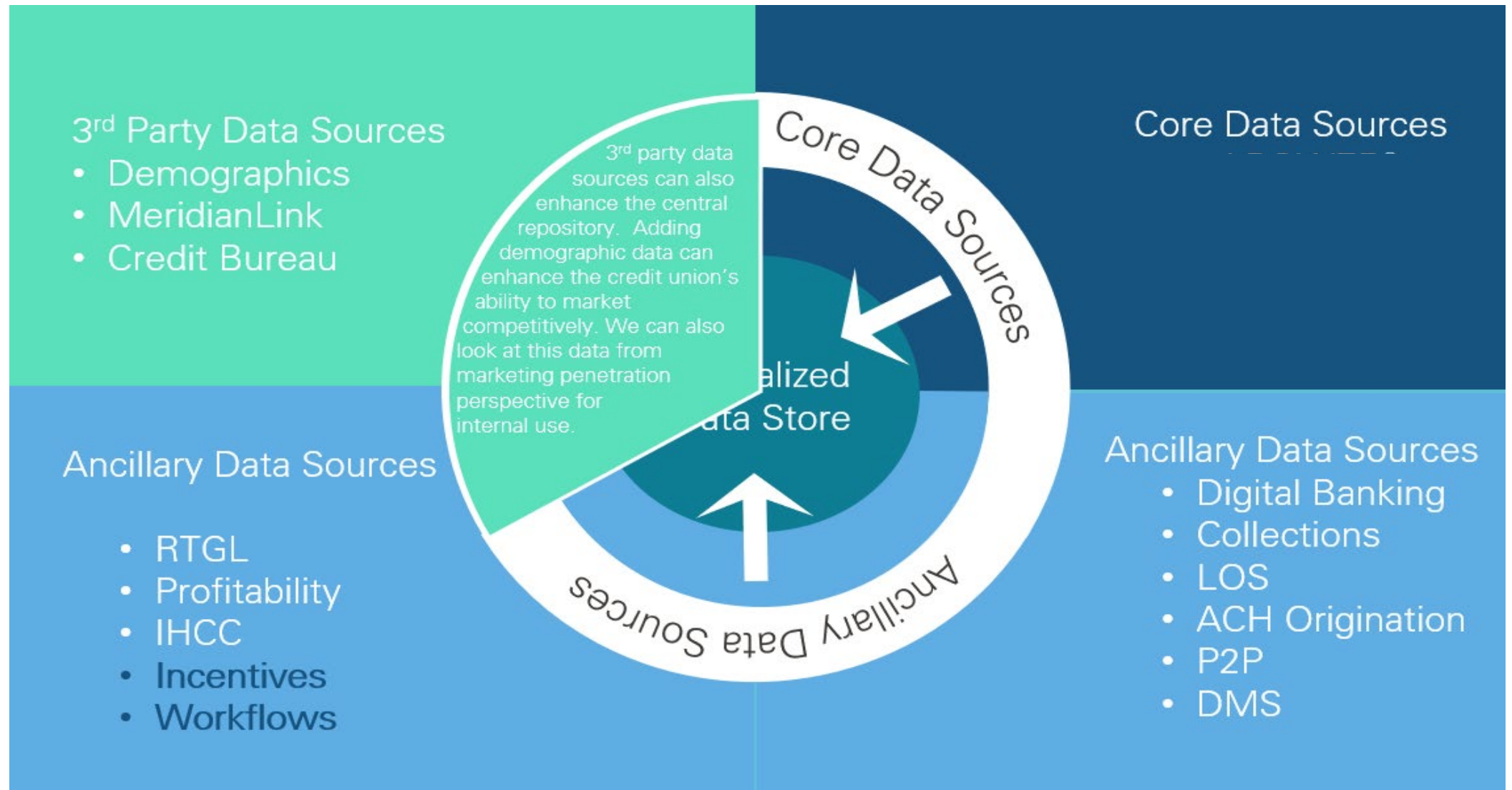
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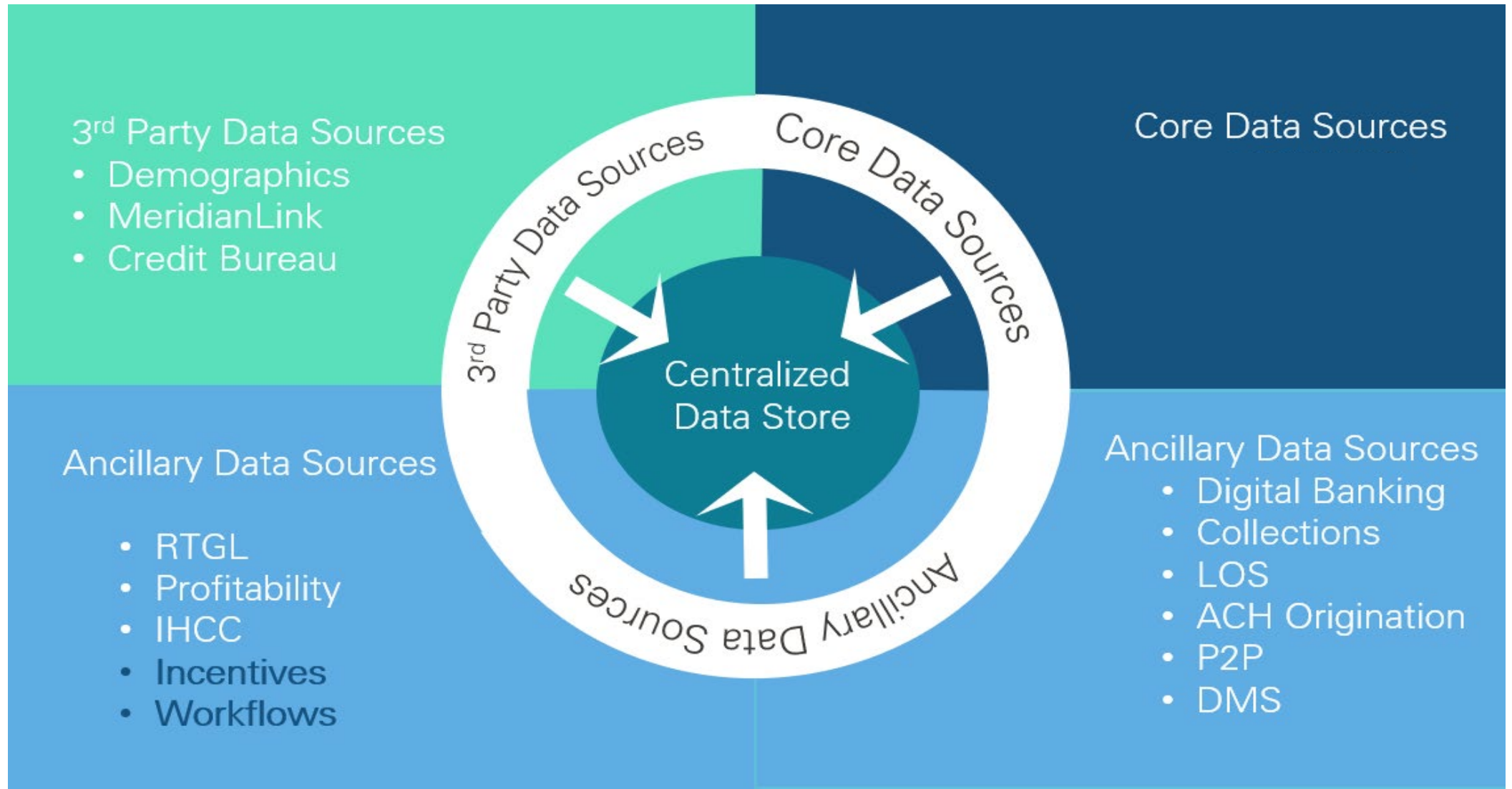
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Data Strategy Benefits

More Effective Marketing & Informed Business Decision-making

- Advanced analytics brings powerful insight
- Real-time improves accuracy of information
- Data from multiple sources enables a complete picture
- Mitigate risk and handle setbacks

Streamline operations

- Easily automate workflows and manage business processes with no coding skills required
- Reducing manual work to save time and reduce errors
- Re-shape your member and internal team experience
- Facilitate collaboration across departments



Most Importantly: Accelerate Digital Transformation!

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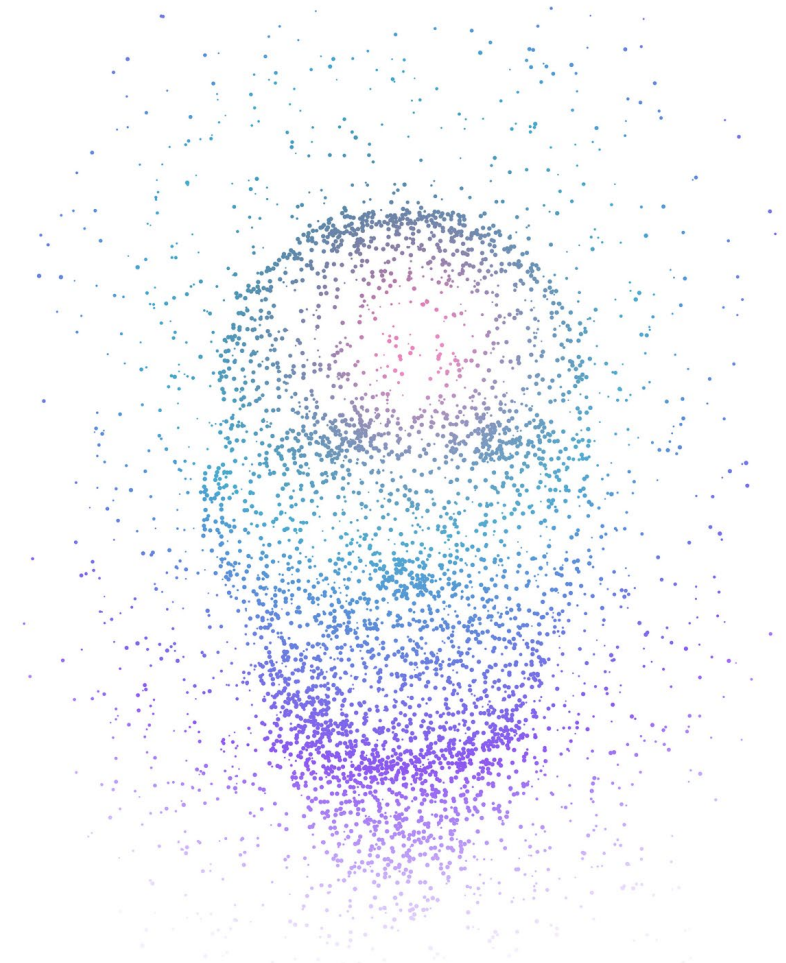
What is AI?

Predictive Analytics

- Future Trends and events

Prescriptive Analytics

- What should be done?
- What can we do to make X happen?



AI = data + algorithms + compute → business opportunity → results



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Benefits of AI

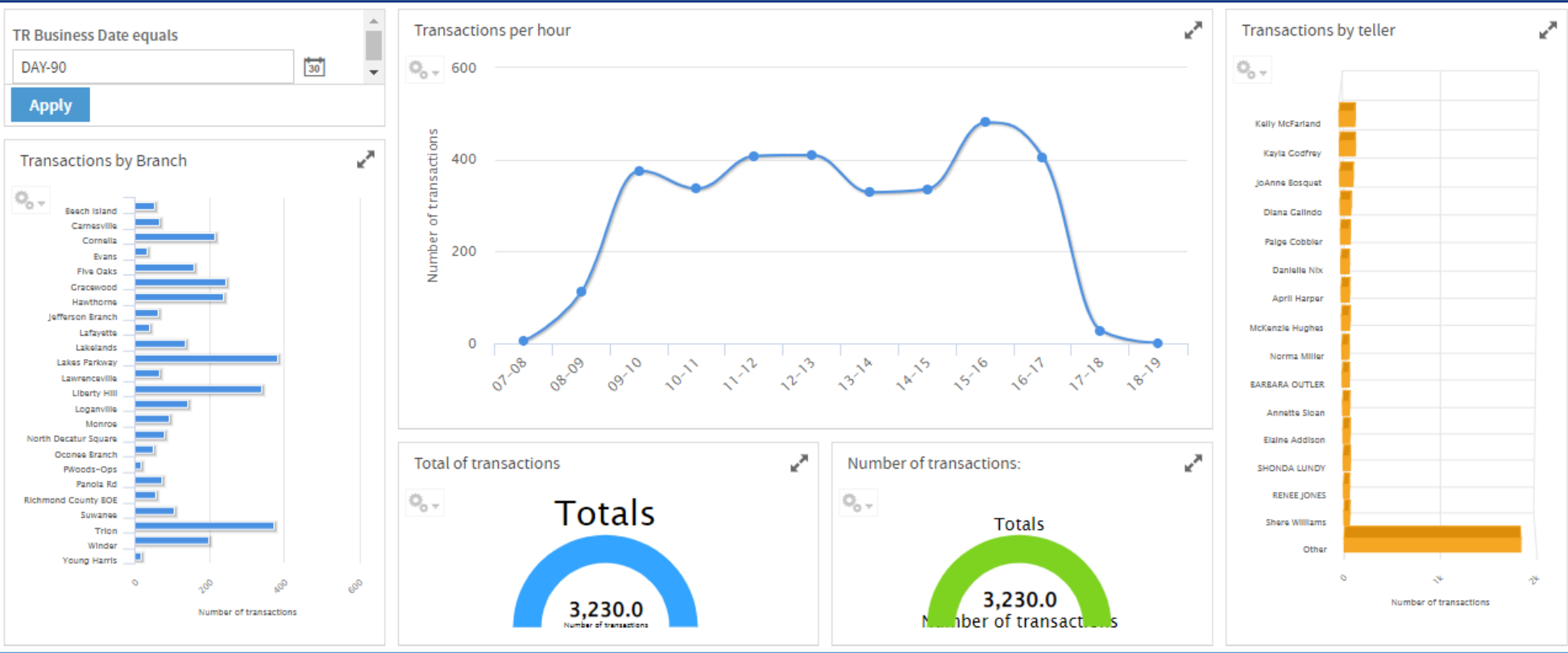
- Efficiency and productivity gains
- Improved speed of business
- New capabilities and business model expansion
- Better customer service
- Automation
- Smart Decision Making
- Enhanced Customer Experience
- Research and Data Analysis
- Solving Complex Problems
- Business Continuity
- Managing Repetitive Tasks



Leveraging a Data Ecosystem



Dashboards



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Business Processes

Input Referral (1) +

Auto Loan
Draft

These are all the tasks people created in this pipe.

+ Create new card

Waiting for account opening (30d) (2)

Auto Loan
643643

- SUFFIX NUMBER: 4
- DATE OPENED: 03/29/2022
- CURRENT BALANCE: 44.66
- PRODUCT CLASS: 4

Due date Apr, 23 16 days ago

Auto Loan
12345

- SUFFIX NUMBER: 1
- DATE OPENED: 03/24/2022
- CURRENT BALANCE: 1,000.00

Pending Credit (2)

Auto Loan **Credited**
20300.0

- SUFFIX NUMBER: 6
- DATE OPENED: 01/01/2000
- CURRENT BALANCE: 10.00
- PRODUCT CLASS: 6

Debit Card **Credited**
615.0

- DEBIT CARD TYPE: 5
- DEBIT CARD DATE OPENED: 03/24/2000
- DEBIT CARD STATUS CODE: 1.0

✓ Credited (1)

Debit Card **Credited**
Draft

- DEBIT CARD TYPE: 60
- DEBIT CARD DATE OPENED: 01/01/2000
- DEBIT CARD STATUS CODE: 1

✓ 45d

Rest in peace... These are all your finished tasks.





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Panel Discussion: Leveraging Data a Ecosystem



Laura Ryll

**Peach State, Chief Operating Officer
/Project Management**

28 years at Peach State FCU
and over 36 years in the
financial service industry.

Lawrenceville, GA



Stacie Tindle

Wordcom, VP Sales

Marketing & Data Intelligence

Independence, Mo



V I S I F I

Roberto Endrizzi

DEDAGROUP, CTO

20 years in Infrastructure and
Software Architecture

Trento, Italy



Cheri Duryea

Duryea Strategic Marketing, President

25 Years Integrated Marketing

Omaha, NE





VISIFI

Roger Willey

DEDAGROUP, Chief Revenue Officer

Roger Willey is the Chief Revenue Officer for VisiFI/Dedagroup and helps lead the strategic direction for the company. Roger has over 35 years of experience helping businesses in all industries develop successful market driven plans.

Omaha, Nebraska



Laura Ryll

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/Project Management

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Roger Willey

DEDAGROUP, Chief Revenue Officer

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and helps lead the strategic direction for the company. Roger has
over 35 years of experience helping businesses in all industries
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Omaha, Nebraska