

AXFI Analytics Competition

Partners Federal Credit Union
Lending in the Information Age

Partners Federal Credit Union

With over 138,00 Members directly and indirectly connected to the world's top entertainment and media enterprise, Partners serves Cast Members, Employees, and Imagineers, along with their families, of The Walt Disney Company. Our Members are comprised of hourly attraction hosts to senior level executives located primarily in Southern California and Orlando, Florida.

It is our mission “To Make All Financial Dreams Come True.”

Partners Challenge

Q: How do we better deliver a consistent member experience during the new account and membership opening process?

A: Partners embarked on a multi-year effort to streamline the new account opening process across all channels by greatly speeding up the lifecycle of application to a product that fully serves the member needs.

Business Intelligence Challenge

Q: How do we support the efforts of the strategic new account opening initiative while providing insight into the progress of the program, metrics to demonstrate program effectiveness and an ongoing view into the overall member experience on the new platform?

A: The PIXIE Decision Summary Dashboard Experience



PIXIE

- PIXIE is the Partners Insights and Intelligence Environment. Given the Disney connection we wanted to illustrate our dedication to the sponsor while delivering valuable and dynamic insights to Partners Leadership.
- The Decision Summary Dashboard lives within PIXIE

Decision Summary Dashboard

Overview:

The Decision Summary Dashboard highlights the decisioning phase of the application lifecycle and the conversion rate into funded loans. It can be used to:

- Evaluate effectiveness of AKC automated decisioning and understand manual underwriting volumes
- Explore process times between major phases of an application to understand how changes may impact the Member's end to end turn-around time
- Understand key decision conversion metrics from a count and dollar perspective

The Effort

- The Decision Summary Dashboard consisted of a multi-department collaboration to integrate three very different lending and membership origination systems.
- A massive mapping effort combined with a detailed requirement collection and analysis process resulted in a unified one-shot view of all lending sources within Partners. This had never before been attempted and it has resulted in some very valuable insights.

ALL BEFORE THE COMPLETION OF THE NAO EFFORT!!

Keys to Success

- CEO and SMT Sponsorship and Dedication
- Communication, Communication, Communication!!
- Did I mention communication?
- Organization and alignment of program goals to strategic vision
- Foundation – Quite simply, none of this is possible if the foundation is not established.