Credit Union
Power BI User Group

Ask Me Anything:
Suncoast's Data Analytics Team

**Credit Union Power BI
User Group**

July Virtual Meet-Up

July 14th, 2020

Agenda

Community Updates

Ask Me Anything: Suncoast's Data Analytics Team

- **Nolan Walker, III** - Data Analytics Director
- **Jill McDaniel -** Data Engineer
- **Anita Davis -** Data Engineer
- **Will Langford** - Data Analytics Manager
- **Dan Neal** – Data Analyst
- **Josh Frame** – Data Analyst
- **Jody Kelly** – Data Analyst
- **Koushika Kalyani** - Data Scientist

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Community Updates

Charlotte Taft

Senior Director of Business Intelligence

Callahan & Associates | Washington, DC

Who Registered For Today's Webinar?

July TUG: How to Win With Enterprise Analytics

Eduardo Santos, VP of Enterprise Analytics, United Federal Credit Union

Tuesday, July 28th, 2020, 3PM ET   usergroups.tableau.com/julycredituniontug/

Since arriving at United just under two years ago, Eduardo has lead a reorganization of the business intelligence function, established a data management and data science practice, converted to a bespoke, Snowflake-powered cloud data warehouse, and stood up a Tableau visual analytics platform.

This session will cover UFCU's path to optimizing their analytics maturity level in over only 12 months - and how these changes have had a significant impact on some of the credit union's most essential areas. Here are some of the topics that we'll cover during this presentation:

- Data strategy: robust, yet flexible.
- Generating better insights from a cloud-based data warehouse.
- Data governance: What's in it for me?
- Data democratization and the top-shelf items of your grocery store.
- Data as a resource: extracting value from data with advanced analytics and AI.

Register

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Highlighted Resources

- [Power BI Desktop June 2020 Feature Summary](#)

- [Power BI Webinar Calendar](#)

- [Senturus Recorded Trainings: Power BI/Tableau/Cognos](#)

- [On-Demand Power BI Training](#)

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Tableau Financial Services Trainings

https://www.tableau.com/learn/series/tableau-financial-services-insurance-vault

https://public.tableau.com/profile/tableau.for.finance#!/

July & August Free Webinars:

- Design Secrets for Non-Designers
- Introduction to Tableau Prep
- Return to Work Financial Services
- Intro to Tableau Desktop: Market Data
- Tableau on Tableau: Marketing
- What Neuroscience Says about Data, Analytics, and Decision-Making

- How to Excel In Tableau
- Data Management
- Intro to Tableau Desktop: Bank Loans
- COVID-19 Analytics for FinServ
- Tableau for Financial Services & Insurance

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Question Topics

Data Governance

Data Management

Data Science/Modeling

Data Sources

Impact/Demonstrating Value

Reporting Structure

Request Handling

Pandemic Response

Scaling Up

Self Service/Data Culture

Specific Analytical Questions

Team History

Team Roles & Responsibilities

Technology

Suncoast Credit Union

Tampa, Florida | Assets: $11B

Name	Suncoast	CUs Over $10B	CUs $1B-$10B	CUs $500M-$1B	CUs $250M-$500M	CUs Under 250M	All CUs in U.S.
Assets	$11,030,431,024	$28,212,125,782	$2,489,868,854	$696,664,567	$350,520,188	$47,728,552	$312,237,741
Loans	$8,588,539,255	$18,721,901,403	$1,771,242,590	$479,502,302	$234,418,620	$28,013,609	$212,673,784
Shares	$9,801,282,272	$22,358,181,901	$2,101,128,959	$594,771,969	$303,690,566	$41,467,869	$262,326,829
Net Worth	$1,011,529,753	$2,964,303,876	$272,045,758	$76,899,619	$39,117,652	$5,744,237	$34,397,137
Members	887,599	1,910,779	167,286	54,134	30,262	4,805	23,128
FTEs	1,849	4,042	424	160	89	13	60
Return on Assets	0.95%	0.48%	0.61%	0.41%	0.43%	0.41%	0.53%
Operating Expense Ratio	2.26%	2.76%	2.98%	3.59%	3.76%	3.75%	3.16%
12-Month Asset Growth	11.74%	14.28%	9.80%	7.05%	6.31%	4.00%	9.25%
12-Month Loan Growth	14.51%	8.85%	7.93%	5.14%	4.92%	2.79%	6.96%
12-Month Member Growth	7.42%	8.50%	4.85%	2.49%	1.74%	-0.10%	4.00%
# of CUs	1	11	335	258	358	4345	5307

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Don't Miss An Update

Sign up using the below link to get email updates – you <u>can</u> select which updates you'd like to receive:

[Analytics Community Email Sign-Up](#)
- [Tableau Community page](#)
- [Power BI community page](#)

We Need You!

Want to…

    Present at an upcoming meeting?

    Suggest a topic?

    Give feedback?

    Join the steering committee?

Email dbartley@callahan.com!