

Credit Union Segmentation Case Study



satori[®] consulting inc.



Challenge

Organic growth is challenging and many credit unions and banks struggle with where to spend their finite resources of people, money, marketing and time, to achieve the maximum return — both ROA (Return on Activity) and ROI (Return on Investment).



Solution

Satori Consulting Inc.'s propriety predictive segmentation solution, *AXYM™*, takes the guess work out of the challenge and provides member-level data that produces results.

The solution formulates segments based on how engaged members are with the credit union today and their personal future buying potential. This powerful combination drives strategies based on deepening share of wallet through Next Best Product and Next Best Service algorithms.



Approach

AXYM is individual credit union specific — not aggregated information from members across multiple credit unions. This ensures that the output mirrors the uniqueness of each credit union partners membership.

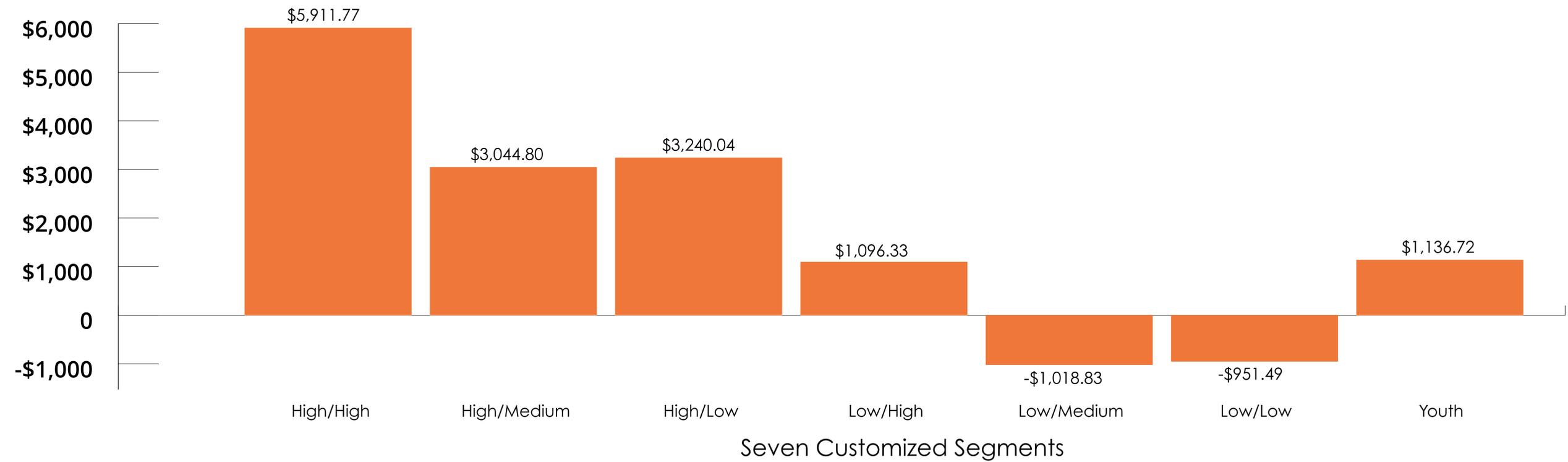
Analysis of entire retail membership at the transaction level, including product, services, channel usage, primary FI, wealth, credit cards, etc., and is benchmarked against Canadian credit unions.

Through Satori's partnership approach we co-develop strategies and work with each credit union to maximize their potential.



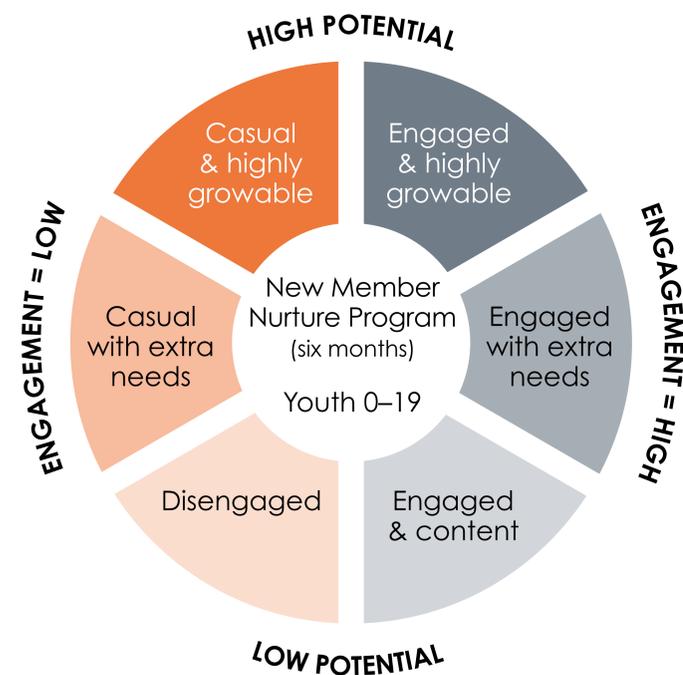
Results (2020–2021)

Average Balance Change Per Segment



Maximizing potential means engaging with ...

The right members



with the right offer

- Next Best Product or Service
- New Member Onboarding
- Wealth
- Primary FI
- Channel Preference
- Attrition

in the right way

- Strategic and Organizational Alignment Support
- Front Line Training and Coaching
- Supplementary Member and Market Research



Maximize your potential today

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