Quickly Include and Exclude Credit Unions In Your Peer Group

The Problem

You want to build a peer group of credit union unions that fit certain criteria. You want to also add just one credit union to that group because you consider them to be a key player in your competitive landscape. In order to do this, you have to create two peer groups (one with the group that fits the criteria and one with a single credit union) and then combine them. Every quarter, you have to go in and update this peer group. Not ideal.

The Solution

Now you can create a peer group and include one, two, or however many single institutions you would like into a dynamic peer group that will be updated every quarter automatically. Peer group game changer.

Here's How You Might Use It.

You are a $500m credit union in Texas with 15 branches and 55,000 members. You want to look at credit unions that are $500m-$1b, in Texas, with at least 15 branches and at least 50k members. **You might use this feature to:**

➡ Add a Texas credit union that is $500m+, but only has 10 branches.

➡ Add a Texas credit union that has 15 branches, but is just over the $1b mark.

➡ Add a Texas credit union that is under $500m, but has more than 50k members.

➡ Add a bordering state credit union that fits the same criteria.

For instructions on how to use the new feature Peer-to-Peer, watch this short how-to video or log in to get started.

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