

Empowered by the Rise Analytics Platform, Simplicity Credit Union Builds a Modern Data Foundation

OVERVIEW:

Establishing a Modern, Scalable Data Foundation

Simplicity Credit Union partnered with Rise Analytics Professional Services to establish a modern, scalable data foundation for reporting and advanced analytics. In order to meet changing reporting requirements and develop a deeper understanding of their data, Simplicity Credit Union needed a production-ready data lake, centralized data in Snowflake and repeatable data workflows with Airflow dbt Cloud. By partnering with Rise Analytics, they were able to accomplish all of their goals while also unlocking the ability to build and scale custom pipelines in-house.

THE CHALLENGE:

Supporting New Reporting Requirements

Simplicity Credit Union needed to go beyond out-of-the-box dashboards and build additional pipelines to support new reporting requirements and deeper analysis. While core system data existed, it was not centralized, modeled or governed in a way that made it easy to use, limiting visibility into key performance drivers and slowing the team's ability to respond to evolving business questions.

Their key goals included:

- Stand up a modern, scalable data lake
- Enable internal ownership of data imports and modeling
- Unlock core system data that was not available in standard vendor tools
- Lay the groundwork for building and scaling custom pipelines in-house

THE APPROACH:

Building on a Well-Modeled Data Foundation

Rather than delivering prebuilt dashboards, Rise Analytics prioritized creating a clean, reliable and well-modeled data foundation. This approach allowed Simplicity to:

- Control how data is analyzed and used
- Build dashboards aligned to their specific business questions
- Incorporate data elements not previously available through vendor tools
- Scale analytics capabilities over time without reworking infrastructure

With Rise Analytics handling the technical setup and data modeling, Simplicity's internal team was empowered to take over dashboard development using trusted, production-grade data.

**Simplicity
Credit Union**

28,500+
members

\$522M+
in assets

“Working with the Rise Analytics Professional Services team helped us build the foundational data infrastructure we needed to move forward with confidence. Their team partnered with us to get our data lake up and running, including setting up Airflow, dbt Cloud and modeling our core system data in Snowflake.

This engagement gave us a strong, scalable foundation so we can now manage our own data imports and develop custom dashboards using information that wasn't previously available in standard vendor tools. Rise Analytics' expertise and hands-on support accelerated our setup and positioned us to take full ownership of our analytics and modeling going forward.”

— Austin Voves, IT Business Analyst at Simplicity Credit Union

THE RESULTS: Stronger, Faster Decision-Making Capabilities

As a result of the engagement, Simplicity Credit Union achieved the following outcomes:

Operational agility: A flexible, production-ready environment to add new data sources and build custom pipelines without reworking the underlying platform.

Team enablement: Internal capability to manage imports, transformations and dashboard development; accelerating delivery and reducing ongoing services dependency.

Trusted analytics foundation: Centralized, modeled core system data that supports consistent reporting today and advanced analytics over time.

With this foundation in place, Simplicity can answer questions faster, standardize key metrics and confidently expand analytics to support better decisions across lending, deposits, operations and member experience.

WHATS NEXT:

With its core analytics infrastructure in place, Simplicity Credit Union is positioned to expand analytics in targeted, high-impact areas, bringing in additional data sources (e.g., digital channels and servicing), delivering role-based dashboards for leaders and frontline teams and iterating on models as new business questions emerge. This roadmap supports ongoing improvements in operational efficiency, member insights and data-driven decision-making.



Ability to create custom pipelines



Expanded internal capabilities



Consistent reporting capabilities

About Rise Analytics Rise Analytics empowers financial institutions with cutting-edge analytics, AI and machine learning to turn data into actionable strategies. With deep industry expertise and innovative data solutions, Rise Analytics helps financial institutions make smarter decisions, drive meaningful outcomes and achieve long-term success. Their powerful combination of technology and advisory services ensures every insight leads to impact. Learn more at RiseAnalytics.com.

