

Landing Page

Total Sales Summary

New Product Summary

Retained Product Summary

Sales Details

Marketo Performance

Report Description

Landing Page: Displays Sales Amount, Sales Units, and Prior Year Sales Amount over time. Slicers located along the header of the report allow for the ability to change the Fiscal Year, Fiscal Quarter, and Fiscal Month where applicable. Additional slicers provided allow for Category, Products data to be filtered. Buttons on the left hand pane allow to change the view from Yearly, to Monthly or Quarterly. All dates shown are based on the fiscal calendar.

Total Sales Summary: Displays Sales Amount, Sales Units, and Prior Year Sales Amount over a yearly time period. Slicers located along the header of the report allow for the ability to change the Calendar Date, Category, and Products shown. Sales Amount and Sales Units are also shown by product. Finally, there is a split of Sales Amount by New or Retained Product Type shown over time.

New Product Summary: This report displays units and sales for products of type "New". Slicers located along the header of the report allow for the ability to change the Calendar Date, Category, and Products shown. Sales Amount and Sales Units are shown by Product and over time.

Retained Product Summary: This report displays units and sales for products of type "Retained." Slicers located along the header of the report allow for the ability to change the Calendar Date, Category, and Products shown. Sales Amount and Sales Units by Product and over time.

Sales Details: This report displays Sales Units and Amounts for all product types. Slicers located along the header of the report allow for the ability to change the Calendar Date, Category, Products shown. Sales Units and Sales Amount are displayed over time against each other. Sales Amount is compared yearly by the Product hierarchy. In additional, Sales Amount and Sales Units are shown by the Product hierarchy at a daily level.

Marketo Summary: This report displays Lead Value and Number of Contact by Product Type over time. Slicers located along the header of the report allow for the ability to change the Calendar Date, Product, and Product Type.

Helpful Hints

- 1) Left hand navigation is used to navigate from report page to report page
- 2) To export data to excel select the elipsis in the top right corner of the visual then select "Export Data"
- 3) Sort order of any graphical visual can also be changed (asc/desc) via the elipsis and selecting "Sort Axis"
- 4) To expand the visual to encompass the entire page navigate to the top right of the visual and select the box icon with an arrow labeled "Focus Mode"

Disclaimers

Marketo data is only at the product level.

Yearly

Quarterly

Monthly

Fiscal Year

FY 2023

Category

All

Product

All

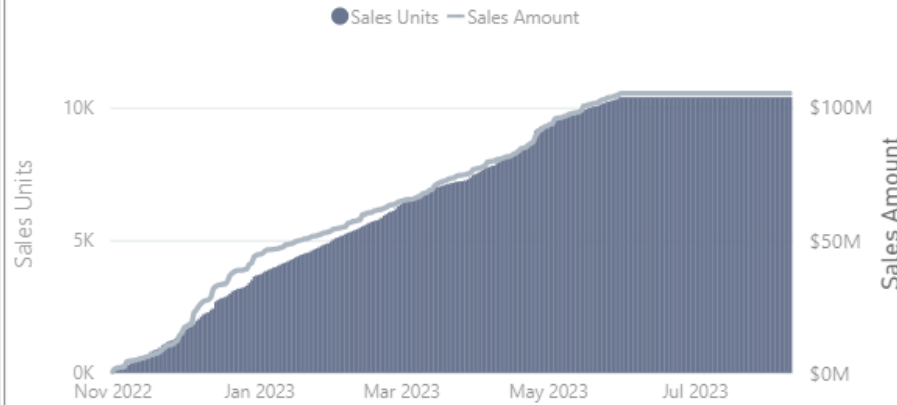
\$105M
Sales Amount

\$105.28M
Sales Amount YTD

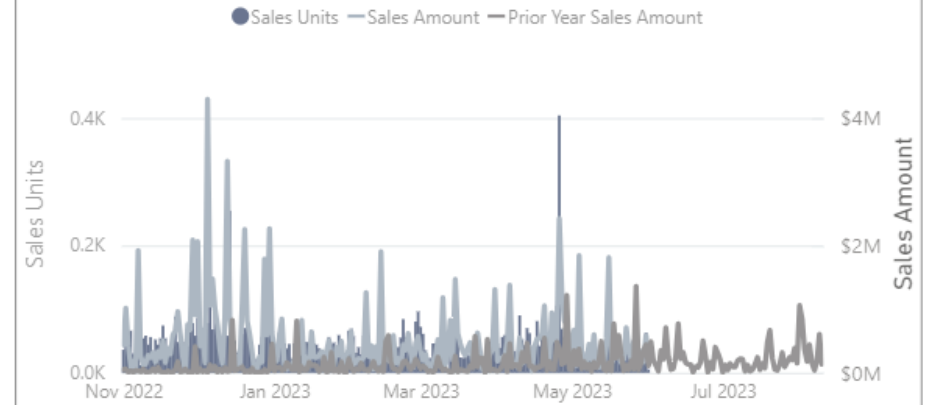
\$46M
Sales Amount Prior YTD

129.87%
YoY YTD Sales Amount Growth

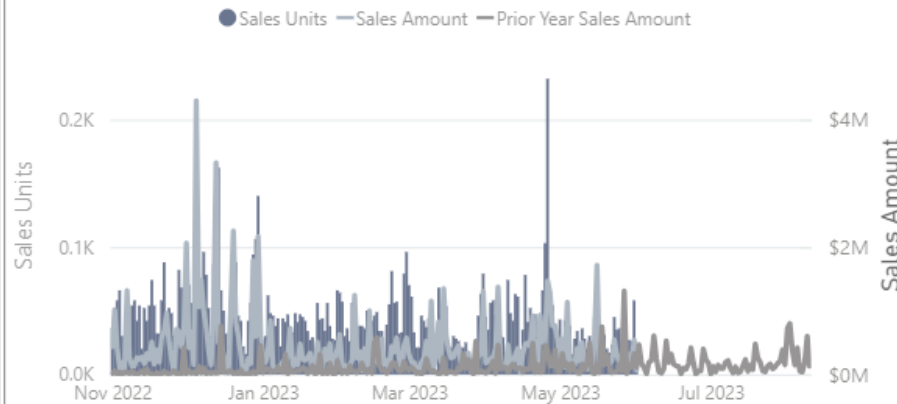
Cumulative Sales Amount and Units



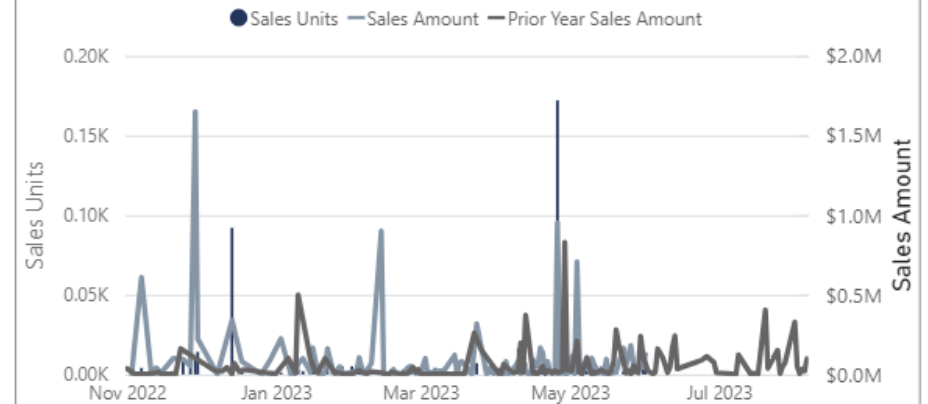
Total Sales Amount and Units



New Sales Amount and Units



Retained Sales Amount and Units



Calendar Date

1/1/2020 8/10/2023



Category

All

Product

All

28K

Sales Units

\$185M

Sales Amount

\$69M

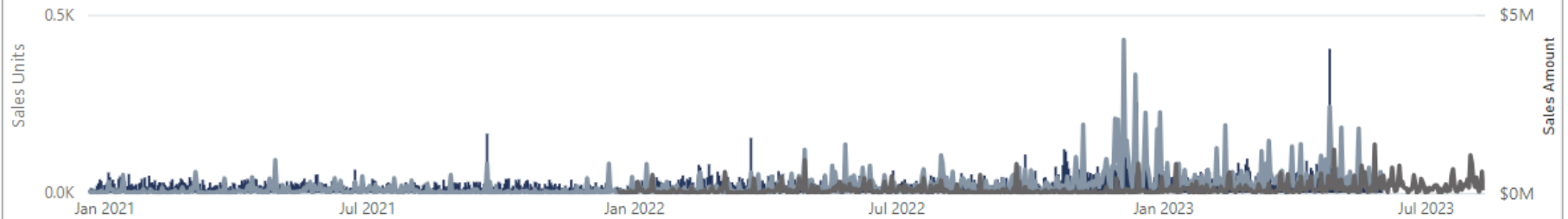
Prior Year Sales Amount

169.65%

Sales Amount Growth

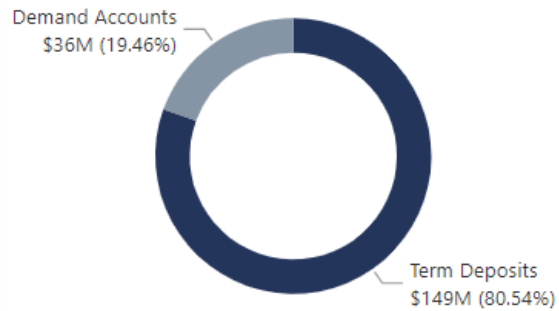
Total Sales Amount and Units

● Sales Units — Sales Amount — Prior Year Sales Amount



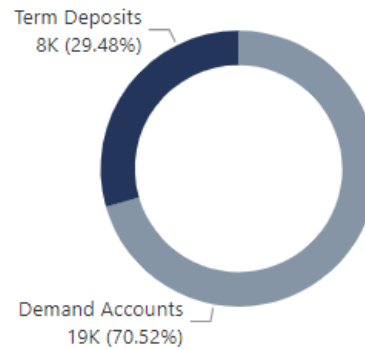
Sales Amount by Product

Category ● Term Deposits ● Demand Accounts



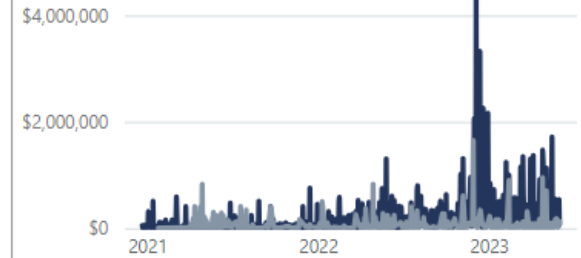
Sales Units by Product

Category ● Demand Accounts ● Term Deposits



Sales Amount Trend by Product Type

— New — Retained



\$568,644M

Sales Amount

23M

Sales Units

\$157M

New Sales Amount

26K

New Sales Units

\$52M

Prior Year New Sales Amount

201.04%

New Sales Amount Growth

Calendar Date

1/1/2020

8/10/2023



Category

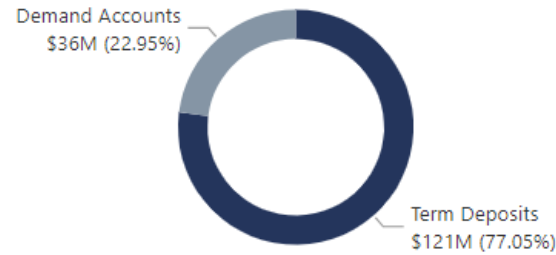
All

Product

All

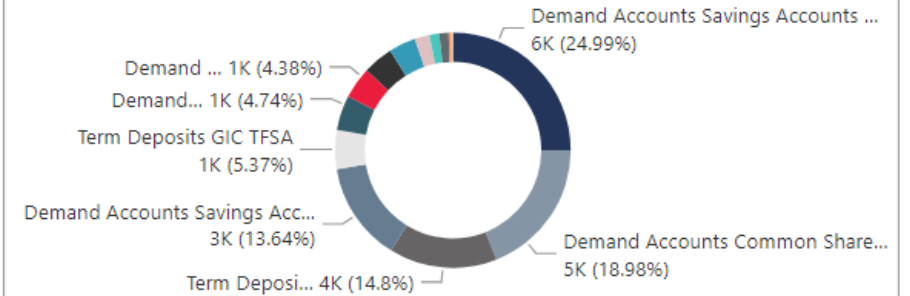
New Sales Amount by Product

Category ● Term Deposits ● Demand Accounts



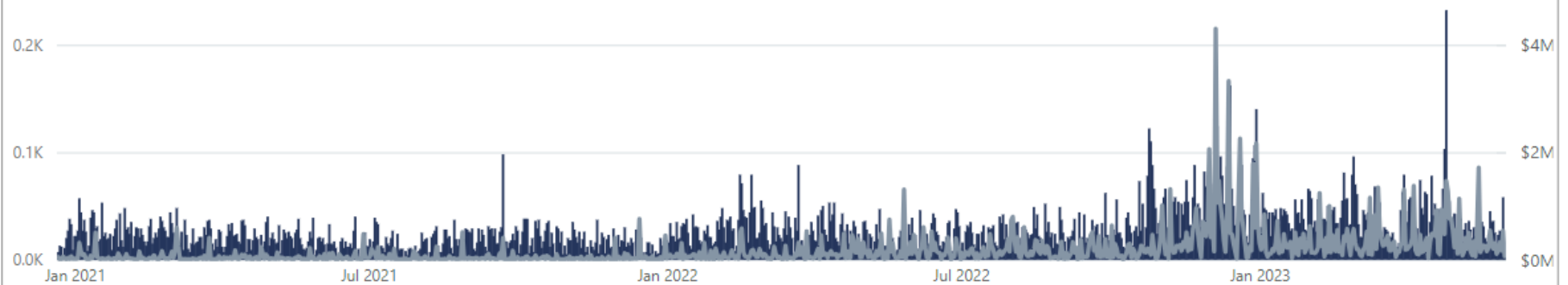
New Sales Units by Product

Category ● Demand A... ● Demand A... ● Term Depo... ● Demand A... ● Term Depo... ● Demand A...



New Sales Amount and Units

● Sales Units — Sales Amount



Digital Banking Sales Dashboard | Retained Product Summary

Calendar Date

1/1/2020 8/10/2023

Category

All

Product

All

\$568,644M

Sales Amount

23M

Sales Units

\$28M

Retained Sales Amount

1,966

Retained Sales Units

\$16M

Prior Year Retained Sales Amount

70.45%

Retained Sales Amount Growth

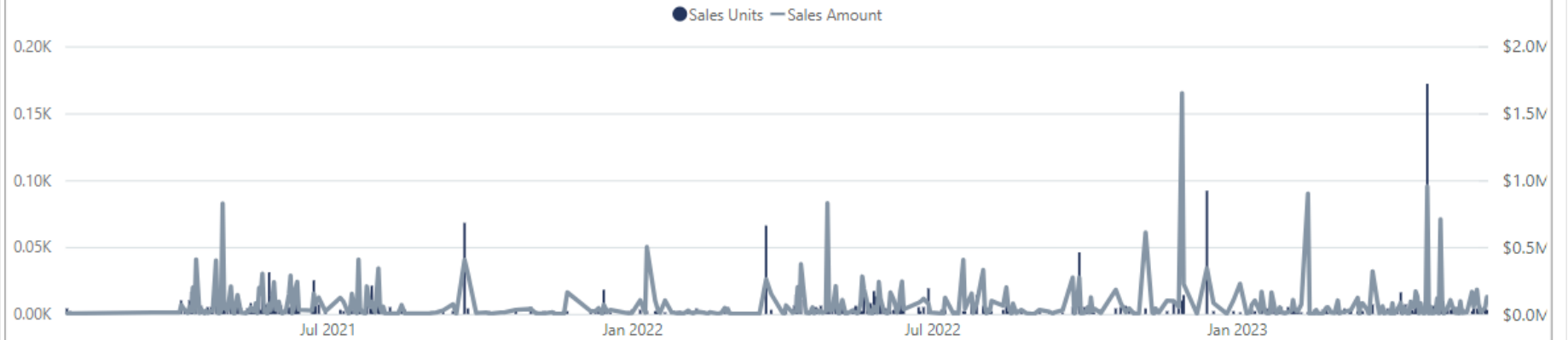
Retained Sales Amount by Product



Retained Sales Units by Product



Retained Sales Amount and Units



Digital Banking Sales Dashboard | Sales Details

Calendar Date

1/1/2020 8/10/2023



Category

All

Product

All

\$185M

Sales Amount

28K

Sales Units

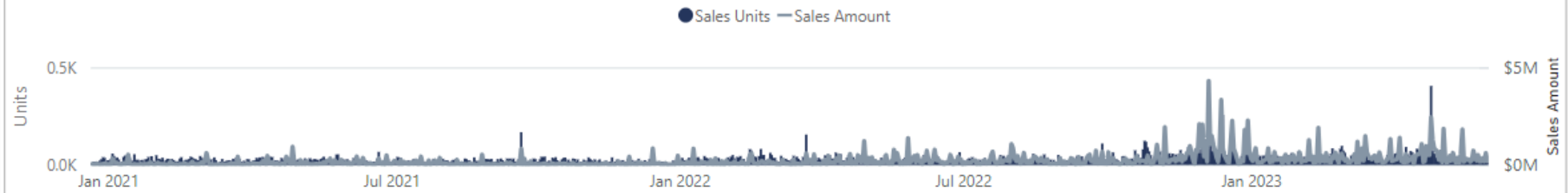
\$61M

Sales Amount YTD

6,717

Sales Units YTD

Sales Amount and Sales Units



Product Class	2020	2021	2022	2023
☑ Demand Accounts	\$244,543	\$14,642,366	\$15,397,609	\$5,723,594
☑ Term Deposits	\$21,222	\$11,418,890	\$82,341,837	\$55,218,544
Total	\$265,765	\$26,061,256	\$97,739,446	\$60,942,138

Product Class	Demand Accounts		Term Deposits	
	Sales Amount	Sales Units	Sales Amount	Sales Units
Tuesday, December 22, 2020	\$25,785	5	\$20,535	2
Wednesday, December 23, 2020	\$8,379	13		
Thursday, December 24, 2020	\$7,486	12		
Friday, December 25, 2020	\$55,000	1		
Saturday, December 26, 2020	\$21,821	11		
Sunday, December 27, 2020	\$2,822	20		
Monday, December 28, 2020	\$34,869	27		
Total	\$36,008,112	19,435	\$149,000,493	8,125

Calendar Date

1/1/2020 8/10/2023



Product

All

Product Type

All

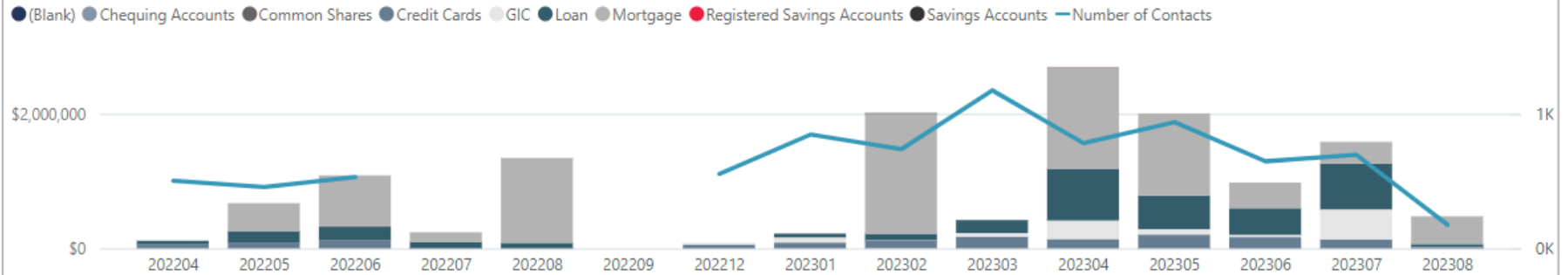
\$14M

Total Lead Value

8,145

Number of Contacts

Lead Value Over Time



Balance by Source

Fiscal Quarter	Lead Value
FY 2022, Q2	\$113,086
FY 2022, Q3	\$1,993,965
FY 2022, Q4	\$1,344,029
FY 2023, Q1	\$291,186
FY 2023, Q2	\$5,127,805
FY 2023, Q3	\$4,565,565
FY 2023, Q4	\$476,164
Total	\$13,911,800

Balance by Source

Year and Month, Fiscal	Lead Value
202206	\$113,086
202207	\$671,082
202208	\$1,083,726
202209	\$239,157
202210	\$1,344,029
202211	\$0
202302	\$72,000
202303	\$219,186
202304	\$2,011,232
202305	\$419,688
Total	\$13,911,800