



Re: Unique TIN - Business Checking

From Chad Doorley <Chad.Doorley@bcsbmail.com>

Date Fri 2/14/2025 3:04 PM

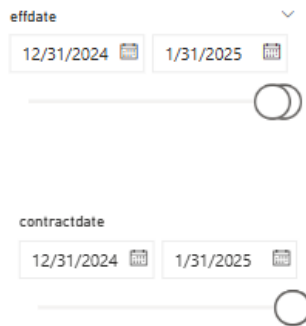
To Stephanie Nordberg <Stephanie.Nordberg@bcsbmail.com>

Hi Stephanie,

Please check out the 'New Business Checking' folder in the Retail Banking shared drive (DA-1).

You'll see there is 'Production/Output' and within that is the PowerBI dashboard. There is the raw excel data that powers it, but I'd avoid going into the excel directly as it powers the dashboard.

Happy to walk you through some of the nuances of the dashboard and the ways to use it if you'd like. For example, I added in contract date to the table on the second page. If you have already filtered down on the first page to branch or a specific officer, sorting contract date in descending order would show you the most recent business checking accounts opened. There are also slicers that you can filter on effective date and contract date. Lots of different ways to view it.



Note effective date is when the data is as of. As a default, I'd put 1/31/2025 to get the most recent data, but it's all there if you need.

Let me know your thoughts & have a great long weekend!

Best,
Chad

From: Chad Doorley <Chad.Doorley@bcsbmail.com>

Sent: Friday, February 14, 2025 8:34 AM

To: Stephanie Nordberg <Stephanie.Nordberg@bcsbmail.com>

Subject: Re: Unique TIN - Business Checking

Hi Stephanie,

That's great! Yes, I'll refresh the data and distribute the dashboard to you and Dave today.

From: Stephanie Nordberg <Stephanie.Nordberg@bcsbmail.com>
Sent: Thursday, February 13, 2025 3:52 PM
To: Chad Doorley <Chad.Doorley@bcsbmail.com>
Subject: RE: Unique TIN - Business Checking

Hi Chad

Are you able to provide us the January report? We do now have power BI downloaded on our desktops for access.

Thank you



Stephanie Nordberg

Internal Sales Coordinator

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Stephanie.Nordberg@bcsbmail.com

Bristol County Savings Bank

215 Pleasant Street | Fall River, MA 02723

From: Chad Doorley <Chad.Doorley@bcsbmail.com>
Sent: Friday, January 3, 2025 2:44 PM
To: David J. Medeiros <David.Medeiros@bcsbmail.com>; Stephanie Nordberg <Stephanie.Nordberg@bcsbmail.com>
Cc: William Muto <William.Muto@bcsbmail.com>
Subject: Unique TIN - Business Checking

Hi Dave & Stephanie,

Please see the attached dashboard I have been working on to track & provide insight into unique business checking accounts. There are filters for account officer & branch and the line graph & current unique business count will update automatically if select only specific branches/officers. I do not have a list of all the branch managers, but if you can provide me with this list or we walk through this on a zoom call, we can select only the relevant officers. This dashboard can be updated on a monthly basis. I'm interested to hear what you guys think.

There is a table on the second page which allows you dig deeper into the raw data and look at different snapshots in time for specific accounts.

Once we finalize this and some of the infrastructure related to PowerBI, you'll have a link that you can click on and it'll open this dashboard in a browser and you can select your own filters.

Best,
Chad



Chad Doorley

Business Intelligence Analyst

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Bristol County Savings Bank

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