VIZOR PRODUCT

# Product Dashboard Report

Activation, engagement, support, and product delivery metrics through September.

**ACTIVATION RATE**
**63.8%**
Up 6.2 pts vs August

**ACTIVATED USERS**
**1,803**
Up 10.5% vs August

**TOTAL LOGINS**
**2,500**
September activity

**AVG. SESSION**
**6m 24 s**
September duration

## Monthly engagement

| KPI | May | June | July | August | September |
|---|---|---|---|---|---|
| Total active accounts | 4446 | 4446 | 3811 | 2835 | 2827 |
| Activated users | 752 | 1293 | 1475 | 1632 | 1803 |
| Activation rate | 16.9% | 29.1% | 38.7% | 57.6% | 63.8% |
| Total logins | 1600 | 3100 | 2790 | 2400 | 2500 |
| Average session | 14m 37s | 9m 44s | 3m 16s | 8m 32s | 6m 24s |

## Site support

| Month | Opened | Resolved | Critical | Top ticket type | Hours used | Retainer | Overage |
|---|---|---|---|---|---|---|---|
| May | 61 | 29 | 8 | Survey | 0 | 0 | 0 |
| June | 58 | 43 | 6 | Survey | 63 | 50 | 13 |
| July | 38 | 24 | 14 | Survey | 74 | 50 | 37 |
| August | 23 | 15 | 0 | Survey | 38 | 50 | 25 |
| September | 27 | 20 | 1 | Survey | 35 | 50 | 10 |

* July excludes users not associated to an RT. ** August deactivates users who have not logged in since 2024. Data as of September 30, 2026.

OVERVIEW

# Action Items

Key takeaways and recommended next steps

- Activation climbed naturally through August and September, likely due to benchmark data submissions.
- We have a healthy base of users activated and logging in on a monthly basis.
- We need to strategize ways to encourage that base to engage in the new features.
- A meeting with Lindsey, Jeff, Russ, and Glenn will be set up in early October to establish initiatives to address this, such as creating discussion boards after every meeting using future agenda topics.
- We are running 10 hours over our TechSector retainer because of high usage in June and July after implementation.
- We have requests for changes to site functionality, setup, and visual placements as we utilize the new site. Those items will be categorized as change requests and paused until the overage comes down.
- The recommendation for 2027 is to separate the budgets for support hours and enhancements/changes so improvements can be made to the site regularly.

VIZOR ENGAGEMENT

# Priority actions & enhancements

## Revenue actions

| Initiative | Owner | Progress update | Next steps |
|---|---|---|---|
| Whitepaper Sponsorship Test | Lindsey | Liam provided test whitepapers on 9/21 | In process of setting up tracking and adding to VIZOR by 10/15 |
| VIZOR Trials for existing Sales | Helga | Sales team aligned to use case and objective | Sales team identifying prospects to target |
| VIZOR Access for New Launches | Jeff/Warren | Utilizing for Money Movement/Payments and AI Lab | Will utilize polls pre-meeting and discussion board post meeting |

## Engagement actions

| Initiative | Owner | Progress update | Next steps |
|---|---|---|---|
| Mass Marketing on Vendor Index | Diana | Email sent on 9/2 | See results in Marketing Campaigns section |
| Mass Marketing on Real-time Alerts | Diana | Email sent 9/14 | See results in Marketing Campaigns section |
| Driving Discussion Boards | Russ/Glenn | Slow increase to board volume in Sept. | LJ setting meeting with Russ/Glenn |

## Site enhancements

| Enhancement | Stage | Progress update | Next steps |
|---|---|---|---|
| Integrating Data Insights into VIZOR | Scoping | Finalizing scoping document | Formal proposal from TechSector |
| Office Hours | Scoping | Scoping document finalized | Meeting with Hitesh to answer questions and then get formal proposal |
| Summit/Meeting reports | Scoping | Building requirements for TechSector | TechSector to scope as Change Request |
| Adding Mimic to child within parent-child | Scoping | Scoped and estimated | Waiting for hours |
| Add a Way to reverse a Did Not Participate | Scoping | Need to scope and estimate | - |
| Highlight Missing Response in Survey submission | Scoping | Need to scope and estimate | - |

ACTIVATION BY RT

# Roundtable activation detail

2,522 activated users of 3,919 total users (64.4%).

| Vertical | Category | Roundtable | Director | Activated | Total | Rate |
|---|---|---|---|---|---|---|
| Card | Fraud | Card Fraud | Jaime | 286 | 421 | 68% |
| Bank | Fraud | Bank Fraud | Troy | 277 | 401 | 69% |
| Card | Collections | Card Collections | Sheldon | 186 | 283 | 66% |
| Auto | Collections | Auto Collections | Sheldon | 125 | 247 | 51% |
| Auto | Credit | Auto Originations | Glenn | 58 | 94 | 62% |
| MV | Disputes | Credit Bureau | Howard | 130 | 206 | 63% |
| | | | | 0 | 0 | - |
| Auto | Fraud | Auto Fraud | Jaime | 49 | 67 | 73% |
| Card | Disputes | Card Chargeback | Jaime | 204 | 269 | 76% |
| Card | Product | Card CEO | Steve | 19 | 27 | 70% |
| Card | Credit | Card Credit Ops | Craig | 26 | 37 | 70% |
| Card | Credit | Card Credit Risk | Troy | 61 | 110 | 55% |
| Card | CS | Card CS | Steve | 56 | 95 | 59% |
| Card | Collections | Card Recovery | Craig | 126 | 161 | 78% |
| Bank | CS | Bank CS | Steve | 41 | 56 | 73% |
| Bank | Product | Bank Debit Mgmt | Jaime | 30 | 53 | 57% |
| MV | Collections | CRC | Sheldon | 45 | 97 | 46% |
| MV | Disputes | Complaints | Glenn | 58 | 105 | 55% |
| Card | Compliance | Card Compliance | Sheldon | 33 | 54 | 61% |
| MV | Fraud | Internal Fraud | Mike | 69 | 103 | 67% |
| Auto | CS | Auto CS | Glenn | 68 | 126 | 54% |
| Auto | Compliance | Auto Compliance | Sheldon | 29 | 58 | 50% |
| MV | Collections | Dialer | Craig | 80 | 123 | 65% |
| Bank | Fraud | Bank Deposit Risk | Troy | 37 | 43 | 86% |
| Fintech | Fraud | Fintech Fraud | Mike | 53 | 76 | 70% |
| MV | CS | WFM | Jim | 48 | 83 | 58% |
| Personal | Collections | Personal Collections | Jim | 41 | 59 | 69% |
| Personal | Product | Personal Product | Howard | 20 | 32 | 62% |

| Vertical | Category | Roundtable | Director | Activated | Total | Rate |
|---|---|---|---|---|---|---|
| Personal | Credit | Personal Risk | Howard | 24 | 38 | 63% |
| Commercial | Fraud | Commercial Fraud | Troy | 25 | 25 | 100% |
| Commercial | Other | Commercial Ops | Steve | 19 | 21 | 90% |
| Wealth | CS | WM CS | Craig | 12 | 22 | 55% |
| Bank | Fraud | Bank AML/BSA | Troy | 16 | 22 | 73% |
| Card | Credit | Card SMB Risk | Sheldon | 28 | 62 | 45% |
| Card | Credit | Card PL Risk | Sheldon | 20 | 54 | 37% |
| Auto | Other | Auto Remarketing | Glenn | 36 | 70 | 51% |
| Auto | Other | Auto RV Lending | Sheldon | 13 | 13 | 100% |
| Auto | Other | Auto Canada Ops | Mike | 52 | 64 | 81% |
| Auto | Other | Auto Floorplan | Glenn | 15 | 30 | 50% |
| Card | Other | Card Marketing Ops | Craig | 7 | 12 | 58% |

ENGAGEMENT BY RT

# Feature engagement detail

Discussion board and poll changes show September activity added since the last period.

| Vertical | Category | Roundtable | Director | Boards | Board change | Vendor | Polls | Poll change | Real-time | Surveys | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Card | Fraud | Card Fraud | Jaime | 4 | +1 | 0 | 3 | +1 | 0 | 23 | 30 |
| Bank | Fraud | Bank Fraud | Troy | 3 | - | 2 | 4 | - | 0 | 31 | 40 |
| Card | Collections | Card Collections | Sheldon | 5 | +1 | 0 | 0 | - | 0 | 28 | 33 |
| Auto | Collections | Auto Collections | Sheldon | 2 | - | 0 | 0 | - | 0 | 23 | 25 |
| Auto | Credit | Auto Originations | Glenn | 0 | - | 0 | 0 | - | 0 | 13 | 13 |
| MV | Disputes | Credit Bureau | Howard | 1 | +1 | 0 | 3 | +3 | 0 | 18 | 22 |
| Auto | Fraud | Auto Fraud | Jaime | 0 | - | 0 | 0 | - | 0 | 2 | 2 |
| Card | Disputes | Card Chargeback | Jaime | 6 | +1 | 0 | 0 | - | 0 | 14 | 20 |
| Card | Product | Card CEO | Steve | 0 | - | 0 | 0 | - | 0 | 0 | 0 |
| Card | Credit | Card Credit Ops | Craig | 3 | - | 0 | 0 | - | 0 | 0 | 3 |
| Card | Credit | Card Credit Risk | Troy | 0 | - | 0 | 1 | - | 0 | 3 | 4 |
| Card | CS | Card CS | Steve | 1 | - | 0 | 2 | +1 | 0 | 5 | 8 |
| Card | Collections | Card Recovery | Craig | 1 | - | 0 | 0 | - | 0 | 3 | 4 |
| Bank | CS | Bank CS | Steve | 2 | +1 | 0 | 1 | - | 0 | 4 | 7 |
| Bank | Product | Bank Debit Mgmt | Jaime | 5 | +1 | 0 | 0 | - | 0 | 1 | 6 |
| MV | Collections | CRC | Sheldon | 0 | - | 0 | 0 | - | 0 | 1 | 1 |
| MV | Disputes | Complaints | Glenn | 6 | - | 0 | 0 | - | 0 | 6 | 12 |
| Card | Compliance | Card Compliance | Sheldon | 0 | - | 0 | 0 | - | 0 | 6 | 6 |
| MV | Fraud | Internal Fraud | Mike | 1 | - | 0 | 1 | - | 0 | 8 | 10 |
| Auto | CS | Auto CS | Glenn | 2 | - | 0 | 0 | - | 0 | 23 | 25 |
| Auto | Compliance | Auto Compliance | Sheldon | 0 | - | 0 | 0 | - | 0 | 3 | 3 |
| MV | Collections | Dialer | Craig | 5 | - | 0 | 0 | - | 0 | 2 | 7 |
| Bank | Fraud | Bank Deposit Risk | Troy | 0 | - | 0 | 2 | - | 0 | 1 | 3 |
| Fintech | Fraud | Fintech Fraud | Mike | 0 | - | 0 | 0 | - | 0 | 0 | 0 |
| MV | CS | WFM | Jim | 2 | - | 0 | 2 | +1 | 0 | 5 | 9 |
| Personal | Collections | Personal Collections | Jim | 2 | - | 0 | 0 | - | 0 | 3 | 5 |
| Personal | Product | Personal Product | Howard | 0 | - | 0 | 0 | - | 0 | 3 | 3 |

| Vertical | Category | Roundtable | Director | Boards | Board change | Vendor | Polls | Poll change | Real-time | Surveys | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Personal | Credit | Personal Risk | Howard | 1 | - | 0 | 0 | - | 0 | 0 | 1 |
| Commercial | Fraud | Commercial Fraud | Troy | 0 | - | 0 | 1 | - | 0 | 0 | 1 |
| Commercial | Other | Commercial Ops | Steve | 0 | - | 0 | 0 | - | 0 | 0 | 0 |
| Wealth | CS | WM CS | Craig | 2 | - | 0 | 1 | - | 0 | 5 | 8 |
| Bank | Fraud | Bank AML/BSA | Troy | 0 | - | 0 | 0 | - | 0 | 1 | 1 |
| Card | Credit | Card SMB Risk | Sheldon | 1 | - | 0 | 0 | - | 0 | 1 | 2 |
| Card | Credit | Card PL Risk | Sheldon | 0 | - | 0 | 0 | - | 0 | 0 | 0 |
| Auto | Other | Auto Remarketing | Glenn | 0 | - | 0 | 0 | - | 0 | 1 | 1 |
| Auto | Other | Auto RV Lending | Sheldon | 1 | - | 0 | 1 | - | 0 | 0 | 2 |
| Auto | Other | Auto Canada Ops | Mike | 0 | - | 0 | 0 | - | 0 | 1 | 1 |
| Auto | Other | Auto Floorplan | Glenn | 2 | - | 0 | 1 | +1 | 0 | 0 | 3 |
| Card | Other | Card Marketing Ops | Craig | 1 | - | 0 | 0 | - | 0 | 0 | 1 |

DISCUSSION BOARD POSTS

# Discussion board activity

59 boards, 64 total posts, and 47 unique posters.

| Vertical | Category | Roundtable | Director | Boards | Total posts | Unique posters |
|---|---|---|---|---|---|---|
| Card | Fraud | Card Fraud | Jaime | 4 | 2 | 2 |
| Bank | Fraud | Bank Fraud | Troy | 3 | 5 | 5 |
| Card | Collections | Card Collections | Sheldon | 5 | 11 | 7 |
| Auto | Collections | Auto Collections | Sheldon | 2 | 2 | 2 |
| Auto | Credit | Auto Originations | Glenn | 0 | 0 | 0 |
| MV | Disputes | Credit Bureau | Howard | 1 | 0 | 0 |
| Auto | Fraud | Auto Fraud | Jaime | 0 | 0 | 0 |
| Card | Disputes | Card Chargeback | Jaime | 6 | 4 | 3 |
| Card | Product | Card CEO | Steve | 0 | 0 | 0 |
| Card | Credit | Card Credit Ops | Craig | 3 | 1 | 1 |
| Card | Credit | Card Credit Risk | Troy | 0 | 0 | 0 |
| Card | CS | Card CS | Steve | 1 | 1 | 1 |
| Card | Collections | Card Recovery | Craig | 1 | 0 | 0 |
| Bank | CS | Bank CS | Steve | 2 | 1 | 1 |
| Bank | Product | Bank Debit Mgmt | Jaime | 5 | 7 | 5 |
| MV | Collections | CRC | Sheldon | 0 | 0 | 0 |
| MV | Disputes | Complaints | Glenn | 6 | 10 | 5 |
| Card | Compliance | Card Compliance | Sheldon | 0 | 0 | 0 |
| MV | Fraud | Internal Fraud | Mike | 1 | 5 | 4 |
| Auto | CS | Auto CS | Glenn | 2 | 2 | 2 |
| Auto | Compliance | Auto Compliance | Sheldon | 0 | 0 | 0 |
| MV | Collections | Dialer | Craig | 5 | 10 | 6 |
| Bank | Fraud | Bank Deposit Risk | Troy | 0 | 0 | 0 |
| Fintech | Fraud | Fintech Fraud | Mike | 0 | 0 | 0 |
| MV | CS | WFM | Jim | 2 | 0 | 0 |
| Personal | Collections | Personal Collections | Jim | 2 | 1 | 1 |
| Personal | Product | Personal Product | Howard | 0 | 0 | 0 |
| Personal | Credit | Personal Risk | Howard | 1 | 0 | 0 |

| Vertical | Category | Roundtable | Director | Boards | Total posts | Unique posters |
|---|---|---|---|---|---|---|
| Commercial | Fraud | Commercial Fraud | Troy | 0 | 0 | 0 |
| Commercial | Other | Commercial Ops | Steve | 0 | 0 | 0 |
| Wealth | CS | WM CS | Craig | 2 | 1 | 1 |
| Bank | Fraud | Bank AML/BSA | Troy | 0 | 0 | 0 |
| Card | Credit | Card SMB Risk | Sheldon | 1 | 0 | 0 |
| Card | Credit | Card PL Risk | Sheldon | 0 | 0 | 0 |
| Auto | Other | Auto Remarketing | Glenn | 0 | 0 | 0 |
| Auto | Other | Auto RV Lending | Sheldon | 1 | 0 | 0 |
| Auto | Other | Auto Canada Ops | Mike | 0 | 0 | 0 |
| Auto | Other | Auto Floorplan | Glenn | 2 | 1 | 1 |
| Card | Other | Card Marketing Ops | Craig | 1 | 0 | 0 |

MARKETING CAMPAIGN RESULTS

# September campaign performance

| Campaign | Recipients | Open rate | Click rate | CTOR |
|---|---|---|---|---|
| Vendor Index | 1708 | 27.9% | 21.0% | 75.2% |
| Real-time -Fraud Clients | 205 | 17.6% | 9.3% | 52.8% |
| Real-time - General Clients | 1438 | 13.3% | 5.0% | 37.7% |

The Vendor Index email performed above the typical 20–25% open rate. The campaigns established awareness of the new features for future targeted engagement.