

# How to Leverage Andi to Drive Profitable Growth

## FEATURING



**Greg Demas**

SVP

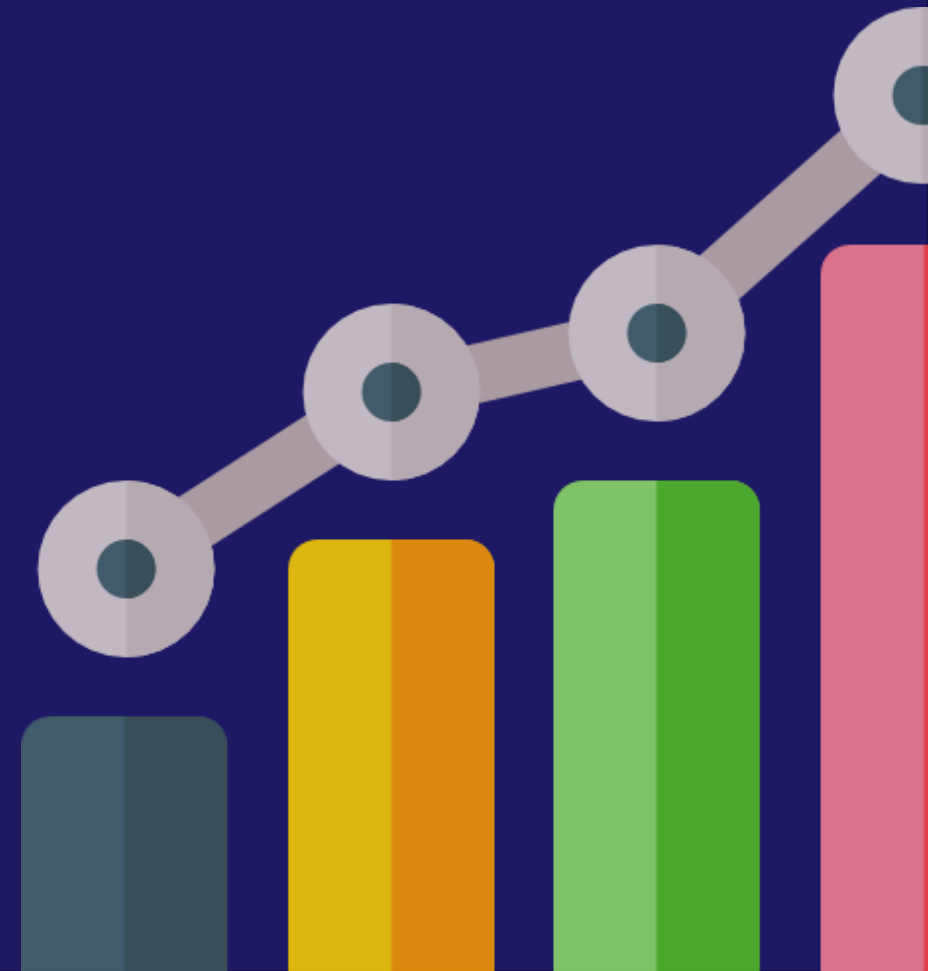
PrecisionLender, a Q2 Company



**Todd Klapprodt**

Senior Product Manager

PrecisionLender, a Q2 Company

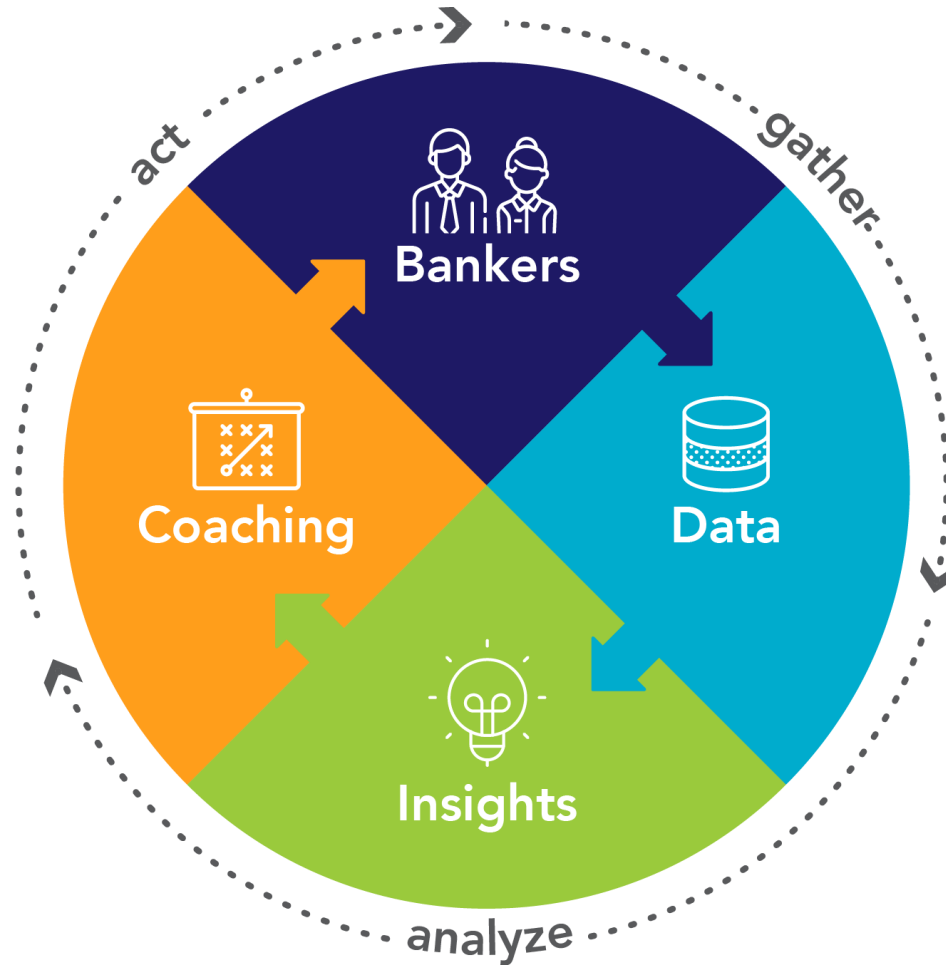


Structure and price deals that work for both the client and the bank,  
while providing a better customer experience.



## Andi

Deliver custom coaching via Andi. Use the Andi Skills Gallery and Andi Skills Builder to get enhanced control over the insights your RMs receive.



## PrecisionLender L3

Consolidate your bank's data into one location, analyze it, and generate insights that can be integrated into your sales and negotiation process.

# Meet Andi

Andi is PrecisionLender's digital enterprise coach, providing in-the-moment insights to bankers throughout the sales process.



### Here are ways to reach the target:

- Increase the Spread by 12 bps
- Add \$32,472 to the Initial Fees
- Add 0.325% to Initial Fees
- Adding \$2,191K of Commercial DDA reaches opportunity target
- Reduce LTV to 67%
- Reduce Maturity to 47 months

### Here are things to consider:

- I recommend our Lockbox Services to handle tenant rents.
- Increase spread to L+165. More than 75% of similar deals are priced at or above L+165
- Add an origination fee of 22 bps - where assessed, origination fees on similar deals range from 20 bps to 30 bps
- Negotiate Foreign Exchange business totaling \$16K – many comparable customers have Foreign Exchange business averaging \$10-25K





# Andi Skills

Like the apps on your phone

Andi Skills help Andi understand the information she's receiving from various inputs and then to respond with helpful insights that are delivered to the RM.

Here are ways to reach the target:

- Add \$3,750 to the Initial Fees
- Reduce LTD to 76%

Here are things to consider:

- If a Floating or Adjustable rate is an option

# Andi Skills Gallery

Like the app store on your phone

The Gallery is where your bank can search through a growing list of skills that can be used to expand the power and potential of Andi.

# Andi Skills Builder

Like an app development platform

Your bank can use Skills Builder to write skills for Andi that are tailored to your bank's specific market and needs.

```

79 // in addition of getCSVFileOf there is getCSVFile which doesn't
80 // contract but does not provide the intellisense on the return
81 // get2dCSVFile which returns a two dimensional array of rows an
82 export function getGoalAmount(skillContext: andiSkills.ISkillCont
83
84   let fileName = "goals.csv";
85   let currentSkillStorage = skillContext.powers.andi.storag
86   let defaultAmount : number = 0;
87
88   return currentSkillStorage.getCSVFileOf<goal>(fileName)
89   .then(values => {
90     if(values == null) return defaultAmount;
91     let goal = values.find((item) => {
92       return item.userId == skillContext.event.user
93     });
94     if (!goal) return defaultAmount;
95     return goal.goalAmount;
96   });
97
98   return goal.goalAmount;
99

```

Windows PowerShell  
Copyright (C) Microsoft Corporation. All rights reserved.  
C:\Prod\_FEB>



# L3 Notebooks

Like the apps on your phone

L3 Notebooks are the outcomes of code written to perform analytics and produce data visualizations. The information in these notebooks is delivered to RMs, via Andi.



# L3 Library

Like the app store on your phone

With the L3 Library, your bank can search through a growing list of notebooks that derive valuable insights from your data.

**L3 Library**

Search

Status

- Enabled
- Disabled

Sort by

All Publishers

- Market Insights** (Enabled 01/23/19) [View/Edit]
- Portfolio Insights** (Enabled 01/25/19) [View/Edit]
- Sales Enablement** (Disabled 01/29/19) [View/Edit]
- Favorites** (Your favorites all in one place.) [View/Edit]

# L3 Workbench

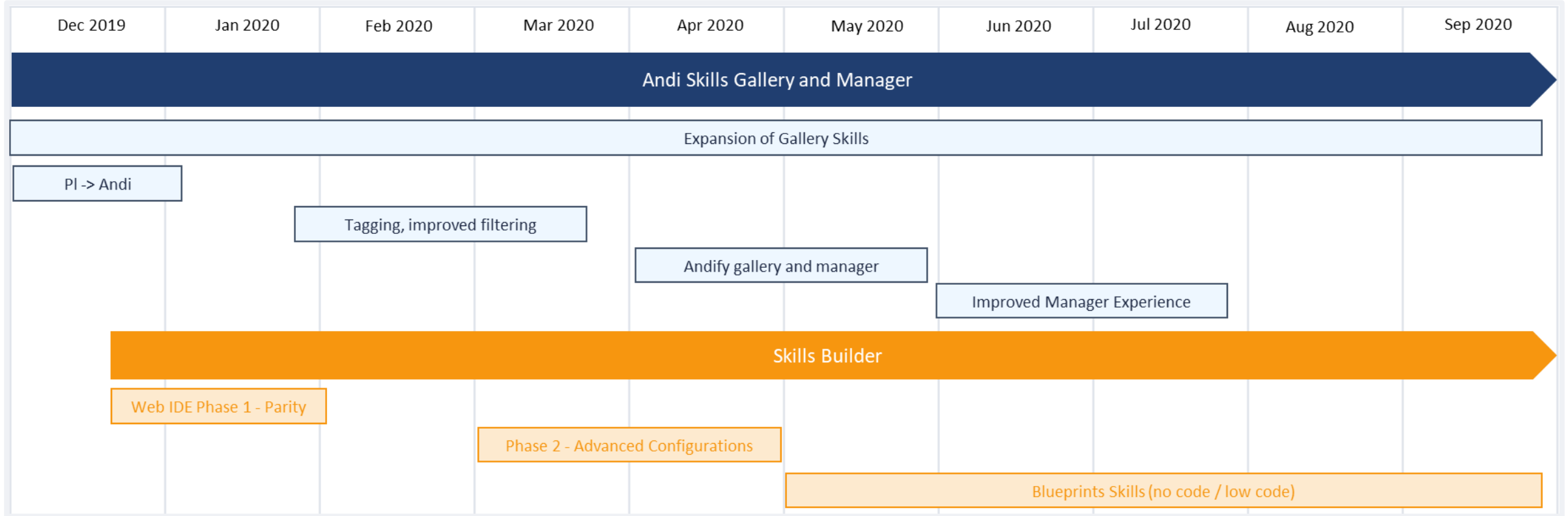
Like an app development platform

The L3 Workbench is where your bank's developers can create their own notebooks, tailored to your banks specific data needs.

```
reportDates = reportDates.withColumn('OneYearAgo', date_
ReportDate.cast('string'), 'yyyyMMdd', 365))
maxOneYearAgo = reportDates.toPandas()['OneYearAgo'].max()
print(maxOneYearAgo)
reportDates = reportDates.withColumn('datestringDelta', fu
maxOneYearAgo), to_date(reportDates.ReportDate.cast('s
reportDates = reportDates.withColumn('absDatestringDelta',
reportDates.datestringDelta))
reportDates.filter(col('datestringDelta') >= 0).orderBy('al
show(50)
minAbsDateDelta = reportDates.filter(col('datestringDelta'
absDatestringDelta': 'min')).collect()[0][0]
oneYearAgo = reportDates.filter(col('absDatestringDelta') :
select('ReportDate').collect()[0][0]
print(oneYearAgo)
# Now we filter the Sales Enablement Data to the Report Da
salesEnableDataOneYear = salesEnableDataStrat.filter(col('!
oneYearAgo)
filteredReportDate = salesEnableDataOneYear.select('Report'
orderBy('ReportDate', ascending = True)
filteredReportDate.show()
```

 Let's see a demo...

# Path Forward Skills



precision**lender**.  
a **Q2** company