

Corelation’s Annual Day of Giving



Corelation employees stepped up again this year and embraced the opportunity to do our part in making our communities a better place to live. At our Annual Day of Giving, we had focused time to bond as we volunteered at organizations throughout San Diego and across the country to make a difference through a variety of acts of kindness.

Conversion Strategist Grace Jackson volunteered with her coworkers at the San Diego Rescue Mission, an organization that provides meals, clothing, and shelter for the homeless. Grace said, “Spending the day at the San Diego Rescue Mission was grounding. It gave me an opportunity to connect with my team alongside an organization committed to loving people in our community that don’t have a home.” Another group helped the Monarch School, a public K-12 institution in San Diego for students who

are experiencing, at risk for, or impacted by homelessness. They assembled 72 backpacks loaded with school supplies to bring to the school. Food necessities were also assembled in 24 duffel bags for at-risk youth at the San Diego Center for Children.

In Pennsylvania, Client Relationship Manager Len Doughty donated platelets at the American Red Cross, which has an urgent need for blood and platelet donations in the midst of coronavirus uncertainties. Len emphasized the importance of these donations, saying “Platelets are critical for cancer patients and persons scheduled for surgery.”



Lead Project Manager Mique Kee crafted headwraps at her home office in Arizona to benefit women experiencing hair loss due to cancer treatments. The headwraps were donated to the Ironwood Women’s Center in Phoenix. Mique shared, “As a cancer survivor myself, I enjoy providing something cozy and beautiful to women going through treatment.”

Service Coordinator Supervisor Valerie Jacobellis and her team volunteered with Habitat for Humanity in the Ventura, California area building townhomes for four low-income, single-parent families. “The recipients each put in 500 hours

of volunteering to qualify – one of them did such an amazing job, Habitat for Humanity hired him!” Valerie shared.



Back in San Diego, Development Software Services Manager Katie Batchelder was busy with her team cleaning up trash on Shelter Island and Kellogg Beach. Katie said, “I always enjoy when we are able to come together outside of work to give back to our communities. I was really surprised by how much trash was on the beach, which really raised awareness that it’s important to pick up those little pieces of trash, not just on a day of volunteering, but all the time—it all adds up!” Other teammates pitched in by cleaning up local parks and trails.

At Corelation, we are thrilled to put our commitment to service into action in tangible ways. We look forward to volunteering together again soon! 🗑️



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Note from the President



As our year draws to a close, there are so many things that I am thankful for – and at the top of that list is our partnership with each of you. Corelation is blessed to be partnered with some of the best credit unions in the industry, who we think of not only as our clients but also as part of our extended family. We are also supported by some outstanding vendors who do not let anything get in the way of providing assistance when we or our client partners are in need. And last but certainly not least, the glue that holds this community together is team Corelation. The commitment to service that every staff member exhibits every day defies description. Quite simply, they are the best team I have ever had the privilege of working with.

The last two years have challenged each of us both personally and professionally. We have all grown in ways that we never imagined possible, and we have all learned a lot about ourselves. I have learned that hosting a virtual client conference in May of 2021 was great for our souls. Even better was seeing some of our client partners and staff at our in-person conference in October. Seeing so many people in one place and with one common goal was magical for me, and it reinforced once again what a wonderful journey we are on... together.

As this year comes to an end, I want to thank each of you for making the tough days manageable, and I want to thank you for supporting us. Who knows what curve balls will be thrown at us in 2022... I know one thing: we will be ready, because together we can get through anything.

Thank you for your endless support and I wish you, your family, and your team a joyous holiday season.

Ciao for now,
Theresa Benavidez
President/CEO, Corelation, Inc.

Employee Profile: Sam Dickey, Conversion Programming Services

Sam Dickey began his professional career at Corelation as a conversion developer after graduating from San Diego State University with a master's degree in Physics. Responsible for writing the programs that process and convert the credit union's core data to be compatible with KeyStone, the conversion programming team is a key part of a successful conversion.

In his four years with Corelation, Sam has been the lead conversion programmer for 10 credit union conversions and contributed his talents to at least 20 more. "Each conversion weekend is the culmination of a year's worth of work. Hearing the excitement and laughter from our clients after achieving such a major milestone is so rewarding," shared Sam.

With his recent promotion to Conversion Development Supervisor, Sam is now focused on training the newer conversion programmers to facilitate their growth and enable them to work independently on conversion projects. Sam is a dedicated team player, so naturally he enjoys working with his team to make their jobs more efficient and more effective using the expertise he's gained through experiencing so many conversions firsthand. "I love being a part of this team. Everyone takes their work very seriously, but we also love to have a good time while we work," Sam said.

When Sam isn't exercising his brain at work, he enjoys being physically active – participating in everything from running half marathons to getting friends together for a game of basketball or flag football.

Providing an exceptional conversion experience is a source of pride for Corelation, and we are grateful to have Sam on our team! 🍷



Corelation Tips & Tricks

Corelation Help Desk Best Practices

Have a non-urgent question? Corelation's online Jira Help Desk is available to our clients to facilitate timely responses and resolutions. When submitting your inquiry, provide a detailed description of the request using caution to avoid posting a combination of personally identifiable member information (for example, member name and member number).

When updates are made to your Jira ticket, the system will send out an automated email notification to keep you informed of the status of your inquiry. If you have additional information or questions regarding an open ticket, log in to Jira and post your comments directly to the ticket.

If you have an urgent or time sensitive issue, please call our service line for support at (619) 876-5074, extension 2.

Subscribe to Client Relations Updates

Stay up to date with the latest important updates from Corelation on the [Client Relations Bulletin](#)* on Confluence! Announcements for KeyStone releases, patches, new classes and training opportunities, as well as important updates are posted to the bulletin board to keep clients informed.

Sign up for email notifications to get the latest announcements delivered to your inbox by clicking the "Watch" option on the upper right corner of the page.

Get Involved in the Corelation Client Community

The KeyStone user community offers a wealth of ideas and expertise, and there are multiple ways to get connected and collaborate with your peers! Get involved with your Corelation client colleagues by joining your local [KeyStone User Group](#)* or by joining the client-run [Corelation Client Group Community Forum](#). 📌

**Confluence access required*



Upcoming Training & Seminars

For the full list of upcoming Corelation training offerings and to register for courses, [click here](#). (Confluence access required)

Loan Covenants

January 6th
12-12:30pm PST

Free Bonus Session!

IRAs & Tax Season

January 26th
12-1pm PST

sponsored by



Business Asset Loans

February 17th
12-1pm PST

In-House Credit Cards

March 18th
12-1:30pm PST

sponsored by



Back-Office Technical Training

Beginner Jaspersoft Reports • Advanced Jaspersoft Reports • KeyBridge Training
KeyStone Server Administration • UI Scripting • Batch Scripting
Forms: General Usage • Forms with UI Scripting • Fundamentals of Agile and Scrum

What's Up, South East User Group?

Collaboration is an integral part of what makes the credit union movement so special, and the Corelation client community is no exception! There are [four regional client-led User Groups](#)* open to credit unions running KeyStone, offering opportunities for networking and sharing ideas and resources.

Virtual Lunch & Learns – Open to All Corelation Clients

With virtual events here to stay, the South East User Group (SEUG) launched a Lunch & Learn webinar series this year to share ideas and best practices for KeyStone.

The well-attended events have covered KeyStone dashboards, KeyInsight and Cross-Sell, and a follow up session on using KeyInsight for staff incentives and sales tracking. Open to all Corelation clients, invitations for future sessions will be available via the [Corelation Client Group Community Forum](#) and via your local user group.

Have an idea for a future Lunch & Learn topic or interested in sharing your expertise? Reach out to Becky Reed, SEUG Chair [via email](#)* or on the [community forum](#).

Corelation South East User Group (SEUG)

The SEUG aims to meet twice a year and is looking forward to hosting in-person events next year as conditions permit, including at the upcoming Corelation Client Conference. Plans for 2022 include a new initiative to extend their

networking opportunities to KeyStone users by specific role, such as branch managers, to learn from one another and share KeyStone best practices.

The SEUG will hold elections in July 2022 for all Board of Directors positions. If you're interested in serving on the board, reach out to [SEUG Chair Becky Reed](#)*. 🗳️

**Confluence access required*



South East User Group meeting at First Service CU in Houston, TX

Certified Partner Spotlight: DocFox

Digitize Onboarding for All Members, Regardless of Account Complexity

For a full list of Corelation partners, [click here](#).

Great member experiences are key to retention, a critical metric for any credit union. What's especially important is starting member relationships off on the right foot with onboarding. And since it's 16 times as expensive to build a long-term relationship with a new member than to nurture the loyalty of a current one, it's important to get it right the first time.

Best-in-class onboarding experiences require more than just great service: they require great technology. This is especially true for business members, for which onboarding can be exponentially more complex than onboarding individuals. On top of these challenges, fintech companies seem to have unlimited access to the best tech. So how can credit unions keep up when it comes to improving onboarding to retain new members and their businesses?

Automated business account opening gives credit unions



the edge to onboard all members, regardless of account complexity. Digitizing onboarding means more than just sticking all processes in the cloud. To start, rules and logic specific to your credit union need to be baked

directly into a solution's processes and workflows - meaning no manual, duplicative work for staff. New members should be able to begin opening an account in a branch or online, and complete it anywhere. Digital account opening improves productivity, reduces cycle time from weeks to days, and provides a better member experience, resulting in happier, more valuable relationships with members.

Ready to create great member onboarding experiences? DocFox is the leading provider of automated business account onboarding software, and is used by over 250 financial institutions worldwide. [Request a live demo](#) today and see it in action. 🗳️

Corelation Client News & Success

Coast Central Credit Union

For the first time in history, the 2021 U.S. Capitol Christmas Tree, the "People's Tree" was selected from our community within the Six Rivers National Forest in Eureka, CA and Coast Central Credit Union CEO Jim Sessa was bestowed the honor of participating in the tree lighting ceremony! The tree included many handmade ornaments from CCCU employees. The tree, an 84-foot fir nicknamed "Sugar Bear", traveled across the country and went on display on the U.S. Capitol West Lawn on December 1st during the tree lighting ceremony. Prior to the tree's journey, CCCU CFO Fred Moore and his wife Jackie, owners of Humboldt Craft Spirits, produced a "Sugar Bear" gin from the tree's fir needles that was served at the numerous tree lighting receptions. Read more [here](#).



FOUNDERS FEDERAL CREDIT UNION

Congratulations to Founders Federal Credit Union for winning an inaugural IDC Future Enterprise Best in Future of Digital Infrastructure North America Awards! Founders FCU won the Autonomous Operations category for improving their infrastructure agility, security, and performance using intelligent analytics and automation. Founders FCU successfully implemented an overhaul of their data center focused on cyber resilience, giving them the ability to fully resume business operation within 1 hour of a serious cyber security incident. Read more [here](#).



nw preferred federal credit union

Theresa Fichtner of NW Preferred Federal Credit Union has been recognized in the 2021 CUNA Technology Council Awards! Theresa won this year's Technology Top Community Contributor Award for collaborating and sharing her expertise and ideas with her peers within the CUNA Councils Community networking platform. Please join us in congratulating and thanking Theresa for her contributions and commitment to the credit union community! Read more [here](#).



Welcome, New Clients

(Through December 1, 2021)

West Community Credit Union

\$361 million in assets
O'Fallon, MO



REV Federal Credit Union

\$905 million in assets
Summerville, SC



Carter Federal Credit Union

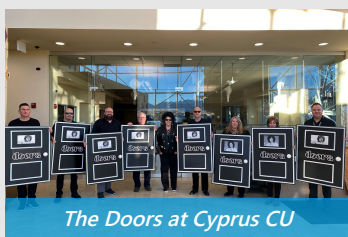
\$549 million in assets
Shreveport, LA



Conversiongram



Financial Center First CU



The Doors at Cyprus CU



ProFed CU



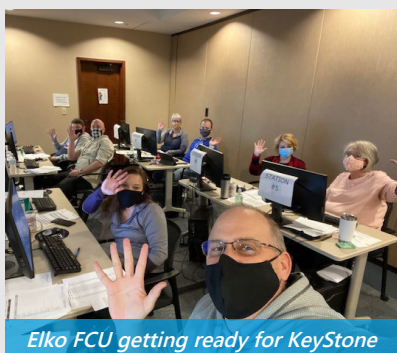
CORE Tour at Cyprus CU



Selfies at Elko FCU



Rockin' Out at Cyprus CU



Elko FCU getting ready for KeyStone



Working Hard at IH Mississippi Valley CU



Credit Union 1



Smiles at Elko FCU



Cheers, Cyprus CU



Financial Center First CU



OU Federal Credit Union



Elko FCU

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