

Inside the 5th Annual Corelation Client Conference

Anticipation, hustle, and pride were among the blend of feelings that coursed through us as we planned and prepared for our annual client conference. Anticipation of the events ahead, hustle to make sure we put an enjoyable and informative event together, and pride because we've made it this far! We are approaching a decade as a company and have definitely made our mark on the industry with a comprehensive and ever-expanding product. However, we were also excited. We were excited to not only meet with and share the latest and greatest available information about our company and product, but also to reconnect with our current clients, meet with prospective clients, and strengthen our relationships with our vendors whom we consider partners.

On Tuesday, June 7, attendees had two options to help get them settled in and acquainted. One was the 5th Annual Corelation Golf Classic at the Maderas Golf Club in the Poway community of San Diego. The other was lunch and wine tasting at the Bernardo Winery. Both options served as fun, relaxed ways for staff and visitors alike to ease into the conference that would start the following day.



The winning team from Corelation's 5th Annual Golf Classic:
 Jim Harris (USE), Scott Butler (Desert Schools),
 Jeff Benson (Bellwether), and Ron Amstutz (Desert Schools).

Wednesday morning started with breakfast and registration, which were then followed by a welcoming address by Corelation's executive team. After a year of hard work, it was nice to reflect on how far we have come as a company. During her opening comments, Corelation President Theresa Benavidez provided numbers to highlight the accomplishments that we achieved over the year. The 2015 conference saw 97 credit union attendees, whereas 2016 played host for 128 of them. In addition, 30 attendees from 11 prospective credit unions spent the week with us, versus the 13 attendees from 8 prospective credit unions in the previous year. If you add up all attendees, including clients, prospects, employees, vendors, and guests, the total attendance went from 294 to 364. In addition, we applauded the completion of 11 conversions that took place in the time between conferences. This growth speaks of the close relationships we've made and maintained with our client base. It also made it very clear that the Omni Hotel can no longer house our conference.



Contents

Inside the 5 th Annual Corelation Client Conference	1
Employee Profile: Mark Brocklehurst	3
Certified Partners	3
Thank you, Conference Sponsors	4
A Note from the Editor.	4
A Note from the President	5
Welcome, New Clients.	5

KeyNotes Contributors

Laura Bowers *Editor-in-Chief & Contributing Writer*
 Paul Phruksukarn. *Contributing Writer & Layout*

The opening address was followed by our keynote speaker, Mike Kelly. He touched on the idea of the “complete member experience” and addressed the complex challenges of being successful in today’s credit union industry. A large part of that includes being accessible via multiple channels. This solution seemed very fitting considering Corelation’s reputation as being



Keynote Speaker,
Mike Kelly

a truly open system with an amazing integration tool through KeyBridge, and the high level of collaboration that all our staff provides to clients and vendors alike. The remainder of the day provided attendees with overviews of Corelation’s development efforts over the past year and excellent sessions on topics to ponder. These sessions were presented by guest speakers such as Stickley on Security CEO Jim Stickley and his ever-eye-opening warnings about security, Best Innovation Group CEO John Best’s enlightening commentary on innovation, and Enacomm®, Inc. CEO Mike Boukadakis’ discussion on the importance of trusting members via various channels of self-service.



Thursday’s events were divided into four separate tracks for attendees to follow based on their area of expertise or interest. The tracks featured presentations from both Corelation staff and current credit union clients.



They were geared towards technical, operational, executive, and new client paths. The most wonderful part of these sessions truly has to be the collaborative and accessible approach of having staff and clients work together. The collaboration and camaraderie continued into the evening with dinner and drinks served at the home of the San Diego Padres, Petco Park. There’s nothing like a photo booth, caricature artist, foosball, and game of darts to lighten the mood before everyone says their farewells.

It’s not a stretch to say that all in attendance enjoyed themselves. It was a great week of entertainment, education, and information that truly showcased how much Corelation has grown as a company. We know that we are where we are because of your belief in what we do. We send many thanks to everyone who joined us, and if you missed this year, we hope to see you next year. After the friendship and fun of the conference, we are balanced, refreshed, and ready to dig in and hit our stride until we meet again. 🍷



Employee Profile: Mark Brocklehurst, Conversion Programming

The current state of business has us in a world where countless software companies offer just as many products. The variety of selection offers credit unions a great number of options to choose from. While much of the focus revolves around the features and benefits that these products provide, there is an aspect of the financial services industry that is often overlooked and even regarded as an afterthought. This aspect probably poses the biggest hurdle in our industry. It can make or break the reputation of not just a product, but an entire company. That aspect is the conversion and implementation process. As someone with over two decades of conversion expertise and accomplishments, our employee profile features none other than our Lead Developer from Conversion Programming Services, Mark Brocklehurst.

Outside of work, Mark is not just a bicyclist... he's an extreme biker. He is father to a son who is also his riding partner. They are set to participate in the grueling RAGBRAI® this year: a week of 70-mile days going west to east across the state of Iowa. In addition, Mark is refining his grilling skills from "fast and charred" to "slow and low." On the weekends, he takes walks with his dog, Boo, up and down the beach.

All around, it's safe to say he's made an impression on our company and the industry. Whether you were aware of it or not, Mark has helped hundreds of credit unions move between systems. We're glad to have him on board as part of our team and family. 🍷



Mark was born in Texas. However, with his father serving in the Air Force, Mark and his family moved around quite a bit during his earlier years depending on where his father was stationed. When he was about six years old, Mark's family settled in the Southern California suburb of San Diego known as La Mesa. He attended the local elementary school, middle school, high school, and even university. While he was still in high school, Mark came in third place in a team

mathematics competition held at San Diego State University. When he later attended that university, he started out as a Mathematics major, but he eventually changed directions and graduated with a degree in Computer Science.

In his years of early employment, Mark worked promotions with a car salesman until he settled in with a credit union core processor as a conversion programmer. He gained experience and status over a decade by leading and managing conversion programming teams. Between conversions, he would build tools to facilitate smoother conversions—conversions smooth enough to earn him a highly respected reputation in the credit union industry.

It is often mentioned as a passing joke that there seems to be separation between "tech talk" and common English. Mark excels at serving as an interpreter between the two. We feel lucky that Mark decided to bring his talents to the Corelation family as our Lead Conversions Programmer early enough to be a part of each and every conversion we have completed to date. Not only is he amazing at analyzing incoming data and devising proper translations to the KeyStone core, he is an insightful and entertaining mentor to his team. "I work with a crew of four doing conversion coding. I like it here. I get to team with great people who do great work. I'm proud to be a part of what we bring to clients."

Certified Partners

- Bluepoint Solutions® bluepointsolutions.com
- Business Data, Inc. (BDI®). businessdatainc.com
- Cash Flow Management (CFM) whycfm.com
- Centurion Disaster Recovery®. profitstars.com
- Elan Financial Services elanfinancialservices.com
- Enacomm, Inc. enacomm.net
- HomeCU, LLC homecu.net
- IMM immonline.com
- IMS Integration (IMSI) imsintegration.com
- Information Management Solutions (IMS) . . . cusolution.com
- Millennial Vision, Inc. (MVi) mviusa.com
- OnBase by Hyland Software, Inc onbase.com
- PSCU pscuc.com
- Q2 Software, Inc. q2ebanking.com
- SMA Solutions smasolutions.it
- Stickley on Security (SoS) stickleyonsecurity.com
- TeleVoice televoice.com
- Vantiv® vantiv.com
- Wescom Resources Group (WRG) . . . wescomresources.com
- Wycom wycomsystems.com
- Xpress Data, Inc. (XDI) xdi.com

Thank you, Conference Sponsors

Corelation would like to recognize our partners who generously supported the 2016 Corelation Client Conference. Thank you for your support!

Note: Certified partners appear with a blue asterisk (*)

Sponsorship	Vendor
Platinum Sponsorship	• SMA Solutions*
Gold Sponsorship	• Xpress Data, Inc. (XDI)*
Partner Sponsorship	• Wescom Resources Group (WRG)*
Silver Sponsorship	• Enacomm, Inc.*
Bronze Sponsorship	• PSCU*
Corelation Golf Classic (Tuesday 06/07)	
Golf Balls	• Business Data, Inc. (BDI)*
Golf Giveaway	• GoNet
Beverage Cart	• Cash Flow Management (CFM)*
Golf Hole Sponsorship	• Alkami Technology (5 golf holes) • bkm OfficeWorks • CU Direct (2 golf holes) • Information Management Solutions (IMS)* • PSCU* • RIIS, LLC
Bernardo Winery (Tuesday 06/07)	
Lunch	• SWBC
Conference (Wednesday 06/08)	
Keynote Speaker	• Information Management Solutions (IMS)*
Printing	• Avnet®, Inc.
Lanyards	• Enacomm, Inc.*
Pens	• TeleVoice*
Conference Giveaway	• IMM*
Photo booth	• OnBase by Hyland Software, Inc.*
Breakfast	• Cubus Solutions
Lunch	• Digital Insight Corporation • IMS Integration (IMSI)* • Wycom*
Afternoon Break	• ProfitStars®*
Cocktail Reception	• Jwaala, Inc. • Stickley On Security (SoS)* • Vantiv*
Conference (Thursday 06/09)	
Lunch	• CRIF Lending Solutions
Cocktail Reception	• Alkami Technology • Bluepoint Solutions* • Elan Financial Services* and MasterCard® (co-sponsors) • IDS.com
Dinner	• Q2 Software, Inc.*

A Note from the Editor

Corelation friends and family,

We had a great time at the 2016 Corelation Client Conference. The sessions were fun and informative, the food was delicious, and the company was exceptional.

We are releasing our conference-themed issue a bit later than usual because the conference was held on a later date than it was last year. I hope you find the conference coverage to be interesting and insightful.

Thank you so much for your partnership and support. I hope you enjoy this issue of our newsletter as much as we enjoyed putting it together. If you have any questions or comments about this issue, you can reach me at lbowers@corelationinc.com.

Kind regards,

Laura Bowers
Technical Writer and Editor



About Corelation, Inc.

Based in San Diego, CA, Corelation is the provider of KeyStone—an innovative, person-centric core processing solution for today's credit unions.

Using the latest technology and vast experience in the industry, KeyStone promotes unparalleled connectivity to best-fit solutions through the KeyBridge API, empowering credit unions to offer superior customer service.

A Note from the President



For the last few weeks leading up to our annual client conference, a flurry of activity and anticipation filled the air here in our office. Everyone quickly worked to put the final touches on the conference materials, accommodate last-minute guests, and film pieces of our opening presentation. I always look forward to this time of year because it is such a special opportunity for our staff, clients, and vendor

partners to connect. It is also a perfect time for our new and prospective clients to get to know us and see our company principles in action: *Reputation, Relationships, and Results*.

Our reputation resulted in our first sold-out conference. We had more requests to attend than we could fit in the conference space and vendor hall. Next year, we will hold the conference at a venue that can support all of our partners and prospective clients.

Our reputation has also earned us trust from credit unions of all sizes. As one client recently explained to me, their credit union chose our core after they visited our conference because they saw that we take care of our clients the same way that they take care of their members. In our culture and our software, our goal is to provide the tools you need so you can give your members the best experience possible.

The conference creates valuable opportunities to celebrate and deepen relationships. It is a family reunion for us and our partners. As we learned together at the sessions and cheered as new partners were announced, each table at the conference was a wonderfully collaborative mix of clients, staff, and vendors. Credit unions inspired other credit unions at the roundtables as they shared their insights and strategies. From swapping conversion stories over a selection of wines at the Bernardo Winery to catching up while stargazing on the Petco Park balcony, it is always a pleasure to spend time together.

We are only halfway through the year, but we have been working hard to deliver results. We moved into our spacious new building by the San Diego Bay and have been hosting clients at our beautiful new home. We had our biggest conference to date with record attendance. We signed our 50th client, Lone Star Credit Union, and have been steadily increasing the number of conversions we perform each month. As we celebrate these milestones, we know that our success is a result of the partnerships that we have formed. Our client conference is our opportunity to thank the organizations and individuals who have been integral to our success. We couldn't

do what we do, let alone hold a conference, without your partnership and support.

All in all, the conference is a special time each year that reminds us of why we are here. Our core has a person-centric architecture because we believe that working with your members should be personal. At our conference and in our day-to-day support, we strive to deliver an experience that ties together our reputation, our valued relationships, and the results that we enjoy when we partner together. Thank you for joining us on this journey. We hope to see you at the conference next year!

Sincerely,

Theresa Benavidez
President, Corelation, Inc.

Welcome, New Clients

(Through June 28, 2016)

Greater Alliance FCU

Glenn Guinto, President/CEO
\$167 million in assets
Converting April 2017
Paramus, NJ

Lone Star CU

Jerry Clancy, President/CEO
\$108 million in assets
Converting June 2017
Dallas, TX

Western Vista FCU

John Basler, President/CEO
\$144 million in assets
Converting September 2017
Cheyenne, WY

Oregon State CU

Rick Hein, President/CEO
\$1 billion in assets
Converting October 2017
Corvallis, OR



2305 Historic Decatur Road #300
San Diego, CA 92106
www.corelationinc.com
info@corelationinc.com
619.876.5074

reputation, relationship, results

All content copyright 2016, Corelation, Inc., unless otherwise noted.