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Cabrillo Credit Union Completes KeyStone Upgrade

SAN DIEGO - January 10, 2012 - Cabrillo Credit Union (\$191 million; 23,000 members; San Diego, CA) completed its transition to Corelation's KeyStone platform and opened the doors of its five branches on the morning of Monday, October 24, 2011. Spread across San Diego from near the border at its Southbay branch, east to the Grossmont area, and extending to the northern reaches of Carlsbad, Cabrillo represented the largest challenge for Corelation yet, in both geographical reach and programmatic complexity.

Cabrillo acts on their mission to be a member service-oriented credit union that will cater to the needs of its members in any way it can, and the result is a medium-sized credit union with the policies and programs of a much larger institution. From shared branching to customized lending, from streamlined card processing to expanded third party integration, Corelation's programming staff grew the system into a more capable platform ready for the demands of larger financial institutions and their members.

The decision by Cabrillo to commit to this new core processor has its roots in its prior conversion - a full 26 years ago - to another of John Landis' credit union systems. CEO Robin Lentz gave the green light then, and based on her faith in Landis and the Corelation team, gave it again last spring (2010). Since then, Corelation's Mission Valley office has been humming with activity, preparing and guiding the conversion of its first adopter, Harbor FCU, before shifting into an even higher gear in preparation for Cabrillo's conversion this quarter.

"Clearly our credit union has changed in 26 years," said Lentz. "Given all the delivery systems we now offer to our members, the scope of this conversion was simply impressive. I'm excited to see all the benefits KeyStone will provide in the decades to come, and this project's challenges are well worth the opportunity to be a #1 client and be able to provide feedback and to guide system enhancement."

This conversion's success wasn't based on Lentz' faith alone; the tireless efforts of dozens of people from both organizations made the final result possible. Corelation's Product Manager, David Stewart, worked closely with Cabrillo's Vice President of Information Technology, Frankie Duenas, to funnel the huge volume of information being sent back and forth into coherent, actionable plans for development, implementation, and training.



"Asset size doesn't tell the whole story for a credit union like it used to; it's better gauged by their service offerings and the genetic makeup of each," explains Duenas. "With all we offer, it was important that Corelation balance the accommodation of our immediate needs with the creation of a sustainable model for the future. That was done brilliantly, and having Corelation staff onsite throughout and well after the conversion meant a lot, and they let us decide when we were comfortable handling things on our own."

Cabrillo and Corelation weren't alone on this path to conversion, as they were joined by a number of third parties that provided critical development and support to ensure the continued functionality that Cabrillo members use daily. Two of these companies had already been a part of Corelation's first conversion, as TeleVoice's Audio Response solution and CO-OP's ATM Network helped Harbor FCU go live in June 2011. Adding their expertise to the mix was PSCU, WRG, FSCC, FIS, Personix, Wycom, and XDI.

Due to the hard work of these vendors, Cabrillo members are provided 24x7 member support, a loan application and auto-approval system, home and mobile banking platforms, shared branching capabilities, streamlined card services, efficient check printing, and informative, timely mail and e-statements.

"We never saw Cabrillo's signing in terms of them making a commitment to Corelation; We saw it as two organizations committing equally to each other," states Landis. "And with that partnership, there was a lot of hard work to be done by both parties. Together, we accomplished something special, and our company was driven to develop a number of services and functions that will not only serve Cabrillo going forward, but lay the foundation for a better KeyStone system for every one of our clients."

About Corelation, Inc.

Based in San Diego, CA, Corelation is the innovative new core processor for today's credit union. This solution is a member-centric system that empowers credit unions to offer the best member service possible, enhancing their value for member attraction and retention. In terms of industry experience, Corelation's staff has dedicated their careers to creating core systems and providing unparalleled client service. For more information, visit www.corelationinc.com.

