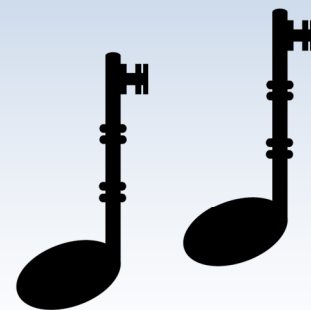# KeyNotes

Opportunity Knocks

The next great module for KeyStone has arrived: We are proud to introduce KeyInsight, the new Customer Relationship Management (CRM) tool added to the core system in the 4th quarter. The core can now track every member interaction desired by the credit union, building a treasure trove of useful information to analyze, as well as streamlining access to member information across branches and channels. Where applicable, these interactions can yield opportunities for product sales, expansion of the relationship with the credit union, or other service offerings, and can automatically queue and notify user groups of these opportunities for immediate follow-up.

A major benefit of the new KeyInsight functionality is that, as with all features of KeyStone, it is fully accessible through the KeyBridge API. In other words, these interactions and subsequent opportunities can be created through any access channel, be it home banking, IVR, or any member-facing application. In addition, the vast data that is gathered through this tracking can be sliced and diced in whatever way the credit union chooses, thanks to KeyStone's built-in data analysis tool.

While this initial version of the software is powerful, flexible, and automated, it is the tip of the iceberg in terms of what can be built on its foundation by Corelation's innovative developers. We are gathering feedback from those clients that have begun to take advantage of this bold new software, and are excited for the directions it could lead us, not to mention the new levels of service that can be offered to members across the country. KeyStone continues to grow and to improve, and KeyInsight is a perfect representation of the opportunity that awaits us in 2014 and beyond.

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A Note From the Editor

Happy Holidays everyone! In the interest of thoroughly acknowledging our Recognized Vendors, I'll keep my input this quarter brief and to the point:

Thank you for your support of Corelation as we move into the New Year! We look forward to another year of growth and of service. If you have any questions or comments, please feel free to reach me at rlandis@corelationinc.com.

- Rob Landis
  Director of Client Relations

Introducing Corelation's Official Recognized Vendor Program

In past newsletters, Corelation has acknowledged a number of vendors with whom we have worked closely to improve many clients' operations, functionality, and products. In the 4th quarter of 2013, we have been able to formalize those vendor relationships, forming the Recognized Vendor Program. In order to be included in this program, a vendor must provide a strong product to the credit union industry, must work with Corelation to build a tight integration between their product and our core, and must display a dedication to the standards of good business and client service to which we hold ourselves accountable. In this issue, we'll briefly introduce the eleven vendors who have already met these benchmarks, and in future issues we'll dive in deeper with each to provide more information on their products and accomplishments.

Bluepoint Solutions offers a variety of financial services to its clients, including optical imaging and data storage, teller and branch check capture, mobile banking, and remote deposit services. They have recently expanded their imaging integration with KeyStone, and have pioneered a streamlined teller capture process that is currently in beta testing. bluepointsolutions.com

Cash Flow Manager provides a product to allow a credit union to make great use of any make or model of Teller Cash Dispenser (TCD) or Teller Cash Recycler (TCR). In addition, this innovative company is a leader in expanding front office automation, and to bringing the Branch of the Future concept to life. cfms4.com

Centurion is an industry leader in disaster recovery solutions, offering an integrated suite of services including Recovery Management, Business Continuity Planning, Mobile Recovery, and Drop Shipment Solutions. It already has in place dedicated equipment on the latest software release for KeyStone recovery.

Compushare is a market leader in providing hosted cloud computing solutions to financial institutions, as well as offering customized solutions to supplement a client's current technology infrastructure. This fine organization focuses on systems management, security, compliance, and application solutions. compushare.com

Enacomm provides world class hosting services for high volume call applications. Their outsourced IVR solutions allow credit unions to achieve expansion quickly with less investment and lower risks. enacomm.net

SMA offers its OpCon platform to provide one ultimate automation solution for the entire credit union. Its scheduling software provides unparalleled KeyStone back office functionality. smasolutions.it

TeleVoice leverages its long-standing and tight integration with KeyStone to take full advantage of the core, providing a proven and convenient IVR solution to thousands of members across the US. televoice.net

Vantiv is one of the most trusted and respected organizations in the payment processing industry. Its innovation and leadership in providing EFT services reflects our own corporate qualities, as does its core belief in technology and service. vantiv.com

WRG offers a host of solutions integrated with the KeyStone system - including eBanking and Mobile Banking - as well as offering its state-of-the-art data centers to support a KeyStone service bureau environment. wescomresources.com

The WyChecks Laser Check Printing and Archiving solution from Wycom saves credit unions time and money on check printing functionality. It supports high-speed, high-volume laser check printing across multiple printers and branches. wycomsystems.com

Xpress Data, Inc. is a service company focused on the customization, production and delivery of credit union member correspondence, and has mastered KeyStone output to generate quality and cost-effective statements, notices, and letters. xdi.com

About Corelation, Inc.

Based in San Diego, CA, Corelation is the innovative new core processor for today's credit union. This solution is a person-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 have dedicated their careers to creating core systems and providing unparalleled client service.

Corelation got its start when principal architect John Landis attempted to retire from the industry after 25 years. However, his passion for the creation of efficient software never left him, and the emergence of new technologies that would allow ever more elegant solutions to be designed represented an irresistible challenge. Over years of research and development, KeyStone was molded and enhanced into its current form, and the Corelation team was assembled from some of the finest minds in the industry.

For more information on Corelation, Inc, please visit our website at www.corelationinc.com.

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Reputation, Relationship, Results

Find us on the Web:
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A Note From the President

Happy Holidays! The time has come put 2013 to bed and look ahead to new beginnings in 2014, to reflect on what we've accomplished and what we've learned, and to imagine all we can achieve and strive for in the year to come. For Corelation, those dreams are larger and more vivid than ever before. 2014 will be a pivotal year for Corelation as we deepen and expand our footprint in the industry. Below are just a few of our New Year's Resolutions:

We resolve to get larger. That's right: counter to every sane person's resolution at this time of year, we're looking to fatten up, and we're talking about putting on a LOT of pounds – hundreds and even thousands. Goodness knows none of us is interested in carrying that weight around our midsection; instead we're looking to add new, dedicated, professional staff to our ranks. Corelation is a start-up no more, and to truly develop and support our top-level software – and to do so with the level of service to which we've dedicated ourselves – requires us to add to our existing talent base. And besides, it's a whole lot more fun to pack on the pounds with abandon than it is to sweat those calories out!

We resolve to flesh out our software. As with our KeyInsight module detailed in the article above, KeyStone is taking on larger and more complex tasks with every release. As it was phrased by one of our most talented developers, Lead Developer for EFT Development Services David Klimek, "We're here to make software that credit unions think is cool." "Cool" software is efficient and user-friendly, it automates manual or complex tasks, and it gives its users more time to work directly with members. KeyStone already includes many tools that meet this standard, and in 2014 we'll be refining these and adding even more. And throughout the process, we'll be actively engaging with our clients to determine the best course of action for improving the system on all fronts.

Speaking of engagement with the industry: We resolve to expand and deepen our relationships with vendors of all types. The formalization of our Recognized Vendor Program is just one step in the plans in place for 2014. It has been Corelation's philosophy from the beginning that there is no better expert on the needs of a credit union's membership than the credit union itself, and that the core processor should not be a barrier to bringing together the perfect blend of complimentary services from any third party. In 2014, we'll be better equipped to bring our own experiences and integrations with a wide sampling of those third parties to bear in order to better inform those credit union decisions, and to bring ever more functionality and convenience to their users.

As with any set of New Year's Resolutions, it will be a challenge for us to meet and exceed these goals. We look forward to that challenge, just as we look forward to the promise 2014 holds if we persevere. We stand strong in our confidence that, if we continue to strive for and achieve these goals we have set for ourselves, the industry will take notice and Corelation's ascent will continue. We thank you for your support, and Happy New Year!

Sincerely,

Theresa Benavidez,
President, Corelation Inc.