



# keynotes™

News & Views for the Corelation Community

Spring 2021 ~ Volume 12, Issue 1

## Culture at Corelation

### The People behind the Passion

In only one year, the average full-time employee spends roughly 2,080 hours at work. Given that we spend about 25% of our time in the workplace, it is hard to overstate the impact of a thriving corporate culture. Corporate culture shouldn't remain an implied concept; it needs to be intentionally built and practiced by leadership and employees alike. With that idea in mind, we'd like to share a glimpse into the culture that permeates the service we provide every day.



The best way to turn a concept into reality is to define it and tangibly put it in plain sight. To that effect, our corporate culture has been meticulously defined and painted on our office walls. Early in Corelation's history, our small group of employees defined our guiding principles as a "Corelation Compass" with *Integrity* at the center surrounded by *Collaboration*, *Innovation*, *Service*, and *Respect*. About five years later when our staff had tripled in size and we had settled into our new headquarters, we knew it was time to revisit them. A team of leadership and employees came up with our current "SPICY" principles to reflect the values we hold ourselves to every day. Along with the Compass, you can see our SPICY principles displayed on our walls as a constant reminder to be *Supportive*, *Passionate*, *Involved*, *Creative*, and *Yourself*, or "SPICY."



SPICY Award Handover

trophy—is passed on with a heartfelt explanation of the decision at our weekly all-staff meeting to allow the rest of the company to share in appreciation. To recognize important contributions on a daily basis, employees have access to plastic peppers they can hand out when they notice their coworkers going above and beyond.

Corelation has made our mark on the industry because we care about the work we produce and the relationships we make in the process. Until recently, you could spot us on-site with our clients taking an active role in their conversion themes, mingling at our annual

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Most companies have some form of an Employee of the Month award for an MVP chosen by the executive team, a supervisor, or teammates. We do something similar for stand-out employees with our monthly SPICY award, but we add our own twist. Every recipient of the SPICY award is chosen directly by the employee who received it the previous month. The torch—or in our case, the chili pepper

client conference, and providing entertainment at company functions with our employee band The KeyTones. The truth is, we genuinely enjoy spending time with our clients and coworkers. Naturally, it took a toll on us when the COVID-19 pandemic forced all in-person activities to come to a halt.

love working for Corelation, our recent hire Amanda Putman summed it up best: "The positivity! Everyone has a great attitude and is very willing to help. I know this without having worked a single day in the office."

As our CEO and President Theresa Benavidez puts it, "We are a client service organization that just happens to be a software company." At Corelation, we take great pride in delivering excellent client service and an elite product. With the absence of our office, we've learned the thing that matters most is the people behind the passion. In the immortal words of *The Lego Movie*, "Everything is awesome, everything is cool when you're part of a team."



On Theme with Long Beach City Employees FCU

It's no surprise that in a remote environment, sustaining corporate culture takes some creativity when your beautiful office full of engaging people is replaced by constant conference calls in your own home. It also takes a lot of humility. We've seen the bad hair days, we've heard kids in the background, we've said the words, "Sorry, my cat walked across the keyboard," and we've shown ourselves in the worst fluorescent lighting. However, we set the tone for our Corelation family long ago and we continue to build relationships that welcome new coworkers and clients with open arms. Our friendships have deepened over video conferencing, we continue to recognize employees with the SPICY award and individual peppers (distributed virtually), and our KeyTones band continues to practice remotely for the day we are reunited.



KeyTones Employee Band

Months after we had transitioned to fully remote activities, we were thrilled to be recognized as a Top Workplace by *The San Diego Union-Tribune* for the second year in a row. This distinction is determined by the results of a confidential employee survey that measures the satisfaction of each employee and department. It is particularly important to us because employee satisfaction is the foundation for the reputation, relationships, and results we take pride in, regardless of whether we are in the office or telecommuting from home. When we interviewed employees who were hired after we transitioned to working remotely and asked them why they

## Upcoming Training and Seminars

- April 6 ACH Origination & Distributions Webex sponsored by **Bankjoy**
- April 6-8 UI Scripting Training Webex
- April 20-22 Batch Scripting Training Webex
- May 13 Share & Loan Corrections Webex sponsored by **PAYVERIS**
- June 8-10 Beginner Jaspersoft Reports Training Webex
- June 22-24 Advanced Jaspersoft Reports Training Webex
- June 23 Operational Enhancements Webex sponsored by **OSG**



## Certified Partner Spotlight: TeleVoice



TeleVoice's extensive industry experience and active partnership are a few of the reasons why Corelation's clients continue to select their Interactive Voice Response (IVR) and agent desktop solutions. TeleVoice doesn't just develop solutions and then retroactively find a way to fit them into a credit union contact center. Instead, they work hard to understand a client's individual needs and then collaborate to develop applications that truly make a difference.

TeleVoice was a pioneer of Interactive Voice Response technology back in 1986. In addition to providing solutions for credit unions, TeleVoice developed a wide range of applications for some of the most demanding clients around including Fortune 500 giants AT&T, Xerox, and Lockheed Martin. The same talented designers and developers who maintain those applications are also working continuously to enhance contact center offerings for credit unions. TeleVoice user groups provide unique opportunities for clients to share experiences and contribute to planning for future enhancements. Best of all, improvements and new products that are developed for one client are made available to their entire client base.

When TeleVoice develops solutions for credit union clients, they focus on two things: improving the member experience and increasing operational efficiencies. They carefully script the IVR application to make member self-service easy and pleasant, reducing the need for agent help.

Their TelePath screen pop solution simplifies calls by displaying member information when a call is delivered to an agent and pre-authenticating members when the agent answers. Time is saved, and members are spared the annoyance of being asked for information they already provided in the IVR application. TelePath also displays helpful information for the agent such as the reason the IVR transferred the call, scripting for cross-sell opportunities based on account characteristics, and much more.

TeleVoice systems handle millions of calls each month for a broad range of clients and process tens of billions of dollars of IVR financial transactions every year. Multiple large financial institutions have credited TeleVoice solutions with millions of dollars in monthly operational savings.

As a Corelation certified partner, TeleVoice provides comprehensive IVR and agent desktop solutions for KeyStone that are tightly integrated in both standalone and data center environments. Clients can choose from cloud-based and on-premise solutions tailored to their needs. These solutions offer

smoother operations, ongoing improvements, and access to an expanding portfolio of contact center products designed for KeyStone. In addition to IVR, TeleVoice offers solutions such as dynamic agent desktop applications, omni-channel communications, skills-based routing, QA recording, outbound dialer, and secure voice biometrics.

TeleVoice recently announced the addition of Tom Farquhar to the TeleVoice team. Tom joins the company as Vice President of Client Relations and will oversee the relationships with Corelation clients. He is an experienced contact center technologist and former credit union contact center manager who will serve as an internal advocate for KeyStone users.

We look forward to a long and fruitful relationship with the team at TeleVoice. For more information about TeleVoice, visit [TeleVoice.com](https://www.televoice.com) or contact Tom Farquhar at 713-574-4870. 🍷

### Client Spotlight

Congratulations to Reliant Credit Union for receiving the New York State Senate Empire Award from New York State Senator Pam Helming in honor of their 50th anniversary. Reliant's longstanding contributions as a community partner and local employer earned it the prestigious leadership distinction. Read more at [ReliantCU.com](https://www.ReliantCU.com).

## Employee Profile: Peter Stewart, Administrative Services

Every successful company has one: the person who wears many hats, knows the detailed ins and outs of everyday office life, and is never too busy to help a fellow employee. Corelation's man with many hats is Peter Stewart, Executive Administrative Assistant. He is an event planner, the secret ingredient that keeps the office running smoothly, and a great resource for help and advice. Peter admits that he is a bit of a control freak, but anyone who has worked with him will tell you that's what makes him so good at his job. He says, "I think of my position as one of service—to our staff, to our clients, and to our vendor partners."



his brother a great deal, Peter says he feels David's energy and presence carried by all those he touched.

Peter feels very fortunate to be a part of the Corelation family. He is proud of the company's amazing growth and his contributions to its success. As Corelation constantly changes and expands, he maintains that trying to hit a moving target is part of what makes his job interesting. His can-do attitude reminds us all to keep an open mind to new possibilities and learn to be flexible.

Peter's role at Corelation is challenging to describe because it has always been in a state of evolution. As one of Corelation's early hires, he came to work for the company based on the recommendation of his late twin brother and Corelation's eighth employee, David Stewart. Peter was originally hired as a forms developer but found himself with two jobs when he was tagged to help with administrative tasks for each annual client conference. As the company grew and a career decision was imminent, Peter chose administration over development and led the conference planning. He notes, "I consider the growth of our client conference a huge success and I'm so grateful for the help that I've received over this past year." Although Peter is moving on from that role, he knows that the conference is in good hands. He continues to serve as a resource while organizing other events such as Advisory Board meetings, client forums, internal staff meetings, and company get-togethers. Peter adds, "I think my major successes are the ones that go unnoticed—flying under the radar, if you will, doing my best to anticipate needs and meet them before they are realized."

Peter's early childhood was spent in San Marino, CA, near Pasadena. He recalled how his father volunteered for the Tournament of Roses parade each year, getting up before dawn to help in the staging area and firing the starting gun for the parade. One of Peter's fondest childhood memories was participating in the Rose Queen's coronation ceremony with David.

Reflecting on the past, Peter notes that one of life's greatest rewards was working with his brother. He half-jokingly admits that they could never have worked together directly as they were too competitive but their shared time at Corelation was an incredible gift. Although he still misses

Corelation's culture is Peter's favorite thing about his job. He loves to watch different departments overcome challenges together. Peter observes, "There is a drive, a determination to be the best we can for each other, our client and vendor partners, and Corelation; and that determination is infectious." He is impressed with the sense of camaraderie and the pervasive team effort in the way we celebrate successes, give back to the community, and share moments outside of daily work. He looks forward to when everyone can be together again.

When we asked what Peter does outside of work, his first response was, "Sleep!" In his waking hours, Peter is a talented musician and singer. He is also fascinated with the concept of consciousness and energy. Peter engages in meditation and participates in a weekly meditation group. He says his next project is to work on the practice of contemplative dialog. He shares, "There is so much divisiveness in this world and perhaps this can help me with that."

Thank you, Peter, for everything you do for each of us and for Corelation! ▀

### Client Spotlight

Michigan First CU saw their business soar during the pandemic by keeping their doors open. With the proper precautions in place and a wealth of resources available to members, their reputation has never been stronger. Read more at [CUToday.info](https://CUToday.info).



## News and Events

### Community Spotlight

Nutmeg State Financial Credit Union is on a mission to support local businesses in the midst of the economic turmoil caused by COVID-19. Throughout the pandemic, the credit union has been diligently educating businesses about government relief options so they can make optimal decisions. Nutmeg has processed over \$20 million in funds to support small businesses through the Paycheck Protection Program and continues to provide assistance to its business members. Read more at [NutmegStateFCU.com](https://NutmegStateFCU.com).



### Client Spotlight

Western Vista Credit Union found a creative way to celebrate Cheyenne-area seniors whose graduation activities were disrupted by the COVID-19 pandemic. Organized by Lorrell Walter, Senior Vice President of Marketing and Member Experience, the Signs for Seniors project displayed each graduate's name, face, and school logo on banners hung from light poles across the city. Each banner was mapped by a team of community volunteers and information and photos were shared by seniors and their loved ones on a [Facebook page](#) created specifically for the initiative. Read more at [CUNA.org](https://CUNA.org).



### Client Spotlight

Blue Federal Credit Union's expansive new Blue Diamond Center was designed from start to finish with the community in mind. In addition to housing their new headquarters and new branch, the center includes eight retail shops, a large banquet hall for corporate and private special events, and a beautiful plaza for Cheyenne residents to enjoy throughout the year. The center stands as a tribute to Blue's commitment to re-invest in and revitalize the community. Read more at [BlueFCU.com](https://BlueFCU.com).



### Community Spotlight

Sidney Federal Credit Union (**sfcu**) is working hard to help the next generation learn money management. The credit union has benefitted 27 local schools and more than 4,500 students by sponsoring free online courses that teach financial literacy. Each course is crafted with interactive content that meets New York State's curriculum requirements for personal finance education. Read more at [WBNG.com](https://WBNG.com).



## Welcome, New Clients

(Through March 1, 2021)

### Red Rocks Credit Union

Pat Ahern, President/CEO  
\$348 million in assets  
Converting March 2022  
Littleton, CO

### Zia Credit Union

Dwayne Herrera, President/CEO  
\$169 million in assets  
Converting January 2022  
Los Alamos, NM

### Fort Community Credit Union

Sue Johnson, President/CEO  
\$301 million in assets  
Converting January 2022  
Fort Atkinson, WI

### National Institutes of Health Federal Credit Union

Rick Wieczorek, President/CEO  
\$749 million in assets  
Converting September 2022  
Rockville, MD

### Statewide Federal Credit Union

Casey Bacon, President/CEO  
\$152 million in assets  
Converting in February 2022  
Flowood, MS

### Heartland Credit Union

Sally Dischler, President/CEO  
\$353 million in assets  
Converting in May 2022  
Madison, WI

### U\$X Federal Credit Union

Mark Volponi, President/CEO  
\$252 million in assets  
Converting in October 2022  
Cranberry Twp, PA

## Certified Partners

(Through March 1, 2021)

To learn more about our certified partners, [contact us](#).

Acuant, Inc. . . . .	<a href="http://acuancorp.com">acuancorp.com</a>
Advanced Fraud Solutions . . . . .	<a href="http://advancedfraudsolutions.com">advancedfraudsolutions.com</a>
Alogent (Formerly Bluepoint Solutions®) . . . . .	<a href="http://alogent.com">alogent.com</a>
Bankjoy . . . . .	<a href="http://bankjoy.com">bankjoy.com</a>
BillingTree® . . . . .	<a href="http://mybillingtree.com">mybillingtree.com</a>
Business Data, Inc. (BDI®) . . . . .	<a href="http://businessdatainc.com">businessdatainc.com</a>
Cash Flow Management (CFM) . . . . .	<a href="http://whycfm.com">whycfm.com</a>
ChannelNet . . . . .	<a href="http://channelnet.com">channelnet.com</a>
ClickSwitch . . . . .	<a href="http://clickswitch.com">clickswitch.com</a>
CO-OP Financial Services . . . . .	<a href="http://co-opfs.org">co-opfs.org</a>
Connect FSS . . . . .	<a href="http://connectfss.com">connectfss.com</a>
Deluxe . . . . .	<a href="http://fi.deluxe.com">fi.deluxe.com</a>
Diamond Communication Solutions . . . . .	<a href="http://dmsolutions.com">dmsolutions.com</a>
Digital Insight (NCR) . . . . .	<a href="http://ncr.com">ncr.com</a>
DoubleCheck Solutions ( <b>New</b> ) . . . . .	<a href="http://mydoublecheck.com">mydoublecheck.com</a>
Doxim . . . . .	<a href="http://doxim.com">doxim.com</a>
eCU Technology . . . . .	<a href="http://ecutechnology.com">ecutechnology.com</a>
Elan Financial Services . . . . .	<a href="http://elanfinancialservices.com">elanfinancialservices.com</a>
Enacomm, Inc. . . . .	<a href="http://enacomm.net">enacomm.net</a>
Entrust Datacard . . . . .	<a href="http://entrustdatacard.com">entrustdatacard.com</a>
FICS® . . . . .	<a href="http://fics.com">fics.com</a>
First Line Insurance . . . . .	<a href="http://firstlineins.com">firstlineins.com</a>
HomeCU, LLC . . . . .	<a href="http://homecu.net">homecu.net</a>
Hyland Software . . . . .	<a href="http://hyland.com">hyland.com</a>
IMM . . . . .	<a href="http://immonline.com">immonline.com</a>
IMS . . . . .	<a href="http://cusolution.com">cusolution.com</a>
IMS, Inc. . . . .	<a href="http://imsdirect.com">imsdirect.com</a>
IMS Integration (IMSI) . . . . .	<a href="http://imsintegration.com">imsintegration.com</a>
ISE, Inc. . . . .	<a href="http://i-s-e.com">i-s-e.com</a>
KeyCU Solutions, LLC . . . . .	<a href="http://keycuso.com">keycuso.com</a>
Mahalo Technologies . . . . .	<a href="http://mahalobanking.com">mahalobanking.com</a>
MEA Financial Enterprises . . . . .	<a href="http://meafinancial.com">meafinancial.com</a>
MeridianLink . . . . .	<a href="http://meridianlink.com">meridianlink.com</a>
Millennial Vision, Inc. (MVI) . . . . .	<a href="http://mviusa.com">mviusa.com</a>
Payveris . . . . .	<a href="http://payveris.com">payveris.com</a>
Plansmith Corp. ( <b>New</b> ) . . . . .	<a href="http://plansmith.com">plansmith.com</a>
PSCU . . . . .	<a href="http://pscuc.com">pscuc.com</a>
Pure IT Credit Union Services . . . . .	<a href="http://pureitcuso.com">pureitcuso.com</a>
SilverCloud . . . . .	<a href="http://silvercloudinc.com">silvercloudinc.com</a>
SMA Technologies . . . . .	<a href="http://smatechnologies.com">smatechnologies.com</a>
Source Technologies . . . . .	<a href="http://sourcetech.com">sourcetech.com</a>
Stickley on Security (SoS) . . . . .	<a href="http://stickleyonsecurity.com">stickleyonsecurity.com</a>
SwitchThink Solutions . . . . .	<a href="http://switchthink.com">switchthink.com</a>
TeleVoice . . . . .	<a href="http://televoice.com">televoice.com</a>
ToolCASE . . . . .	<a href="http://toolcase.com">toolcase.com</a>
Trellance . . . . .	<a href="http://trellance.com">trellance.com</a>
Wescom Resources Group (WRG) . . . . .	<a href="http://wescomresources.com">wescomresources.com</a>
Wolters Kluwer . . . . .	<a href="http://wolterskluwer.com">wolterskluwer.com</a>
Worldpay from FIS . . . . .	<a href="http://worldpay.com">worldpay.com</a>
Wycom . . . . .	<a href="http://wycomsystems.com">wycomsystems.com</a>
Xpress Data, Inc. (XDI) . . . . .	<a href="http://xdi.com">xdi.com</a>

# Conversiongram



Direct FCU



Directions CU



Bulldog FCU



Las Colinas FCU



Educational Systems FCU



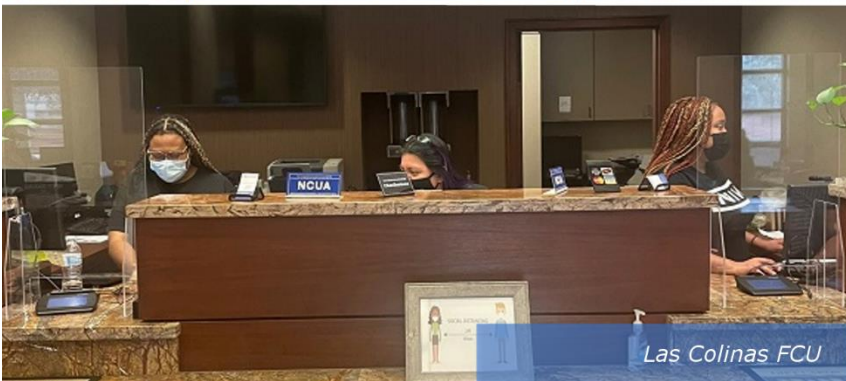
Carolinas Telco FCU



Estacado FCU



Las Colinas FCU



Las Colinas FCU



Pyramid FCU

## A Note from the President

**I**t is hard to believe that we have completed a full year of living in the 'adjusted normal.' I think the past year has taught us a lot about ourselves and, more importantly, the things that are important to each of us. We have all been challenged to be flexible, to adapt, and to hold strong to our roots in difficult times. As Douglas Malloch's poem "Good Timber" puts it, "Good timber does not grow with ease, The stronger wind, the stronger trees." Although this has been and continues to be a season of challenges, our strong community and perseverance continues to weather the storm.



While there is no substitute for gathering in person, it was a pleasure to meet with so many of you at the GAC this year. We may be miles apart, but even a worldwide pandemic can't delay the important work of advocating for the industry and its important service to members. In the panels and resulting discussions about how the credit union industry pivoted to provide critical support to members and small businesses, what I heard again and again was the call to 'keep doing what you're doing.' We are incredibly proud of everything you have accomplished in the past year to listen to your members' needs and provide the services they need to clear the path forward.

The last quarter has been abuzz with activity at our empty headquarters as we put the finishing touches on our new office expansion. Our beautiful new space on the first and second floors adds 88 cubicles, 12 offices, seven Webex meeting rooms, and four large meeting rooms. Just like our workspace on the third floor, our new space will feature photography taken by the employees and KeyStone-themed decals adorning the walls as well as meeting rooms named by the employees. A new area on the first floor dedicated to special events will provide ample space to hold conferences and other important client meetings. There will also be a breakout space reserved especially for you to network and relax. When it is safe to have visitors, we look forward to showing you our new home and having you as our guests.

Just as the past year has required us to exercise perseverance and flexibility, we have been practicing those skills as we work on our expansion. Our original plans for the first floor included an expansive meeting room to hold 250 people, but the pandemic has made gatherings of that size impossible for an extended time. We decided to rework the space into three smaller multipurpose rooms with a removable partition that will allow for large gatherings in the future. The current health guidelines restrict us from using half of the new cubicles we added, so we took the roadblock as a chance to explore options that would allow us to maximize our use of the space when we are allowed to return to the office. With patience and a little creativity, we are turning our setbacks into opportunities for strategic changes.

Our new space will be completed in the near future, and although we won't be able to move into it right away, we are glad to have spent this time investing in the foundation of the place where we will continue to deepen our relationship with you. As we lean into the wind together, our roots are stronger than ever.

Sincerely,

A handwritten signature in cursive script that reads "Theresa".

Theresa Benavidez  
President/CEO, Corelation, Inc.

