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\$1.3 Billion San Francisco Fire Credit Union and Corelation Complete First Fully Remote Conversion

SAN DIEGO - May 21, 2020: In the face of unprecedented challenges, [San Francisco Fire Credit Union](#) (\$1.3B assets; 72,000 members; San Francisco, CA) successfully converted to [Corelation's KeyStone core system](#) over the past weekend. The implementation marked the 96th conversion for core processor Corelation, Inc., but stood out as one of the very first such projects in the industry to be completed in which both organizations were working in a fully remote environment due to the Covid-19 pandemic.

Originally scheduled to convert in April, SFFCU requested a short delay to the project as they focused on the health and safety of their staff and the financial needs of their members. Corelation capitalized on the break to redefine every aspect of the conversion process to ensure success in the new remote environment, and relied on the partnership and open communication that had developed over the course of the project to build the confidence of SFFCU. The close collaboration paid off in a big way as SFFCU upgraded their core system without missing a beat in serving their members, all without a single Corelation associate on site.

"Once Corelation was faced with the challenge of handling all conversion milestones remotely, we went right to work revisiting our communication plan and procedures to make this transition as smooth as possible for our clients," said Lori Paige, Director of Conversion Services for Corelation. "The results were extraordinary."

Kathy Duvall, CEO of SFFCU, echoed those sentiments. "The entire organization – staff, management, and volunteer officials – are very pleased with the outcome. I am proud of SF Fire Credit Union's

accomplishment, and grateful for the collaborative relationship we've formed with Corelation as a key and critical business partner."

The unique circumstances of this conversion required unique solutions. For example, the conversion teams leveraged dedicated video conferencing lines for balancing, validation, and command center activities to stay in close personal touch throughout the event. Corelation added a new "dispatcher" role to the project team responsible for logging and disseminating all issues to the appropriate stakeholders. And to compensate for not being able to drop by a given person's desk, additional check-ins were incorporated into the project plan.

Corelation continues to enlarge its footprint in the credit union core processing industry, especially in the billion-plus space. To continue that expansion so efficiently despite the logistical hurdles presented by the pandemic speaks to the company's creativity, focus on their clients, and nimble response to any situation. As the most recent to adopt the KeyStone platform, Duvall concurred.

"As the CEO of SF Fire Credit Union, I knew how crucial it was for us to select the right core operating system. One that would allow us to give employees the tools to provide faster and more efficient service, as well as a modern architecture that will enable us to continuously improve the digital experience we provide to our members," Duvall says. "We made the right decision in partnering with Corelation. Not only is the KeyStone system a good fit for our present and future needs, but we've always aligned philosophically in regards to project management."

"To me this business is all about relationships and partnerships," added Theresa Benavidez, President and CEO of Corelation. "SF Fire trusted our team to guide them through this event. The smooth implementation was a result of the hard work put in by both organizations."

About Corelation, Inc.

Based in San Diego, CA, Corelation is the innovative 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 has dedicated their careers to creating core systems and providing unparalleled client service. For more information, visit www.corelationinc.com.

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Corelation President/CEO Theresa Benavidez