

Highlights from the 13th Annual Corelation Client Conference

Corelation’s 13th Annual Client Conference kicked off at the Manchester Grand Hyatt San Diego, celebrating the 1920s with its “Roaring Through the Twenties” theme and promising an exciting and engaging experience for all participants.

The conference gathered an impressive group of 1,540 attendees in person and virtually, including credit union partners, vendors, and Corelation employees. Corelation Chairman and Founder John Landis opened by warmly welcoming everyone and Corelation President Rob Landis expressed profound gratitude to the attendees and extended a heartfelt thanks to all who worked tirelessly to organize the event.

Keynote speaker Ron Shevlin, Chief Research Officer at Cornerstone Advisors, provided insights on why current strategies for improving financial health often fall short and how credit unions can use digital tools and AI to enhance their members’ financial health and performance.

On the first day, additional inspiring guest speakers took the stage. Tony Budet, former CUNA chair and former CEO of University FCU (Austin, TX), shared his transformation from introverted accountant to a leader who leveraged relationships for success. His journey, marked by self-awareness and delegation, resulted in top engagement scores, a stronger brand, outstanding performance, and a lasting impact on Central Texas.

Jim Stickley, CEO of Stickley on Security and Mahalo Banking, returned to discuss cybersecurity, offering insights on safeguarding yourself, your members, and your credit union. With real-world examples and future trend advice, Stickley explored evolving risks alongside enduring ones.

Allegiance Credit Union’s Amy Downs shared her harrowing experience of surviving the Oklahoma City bombing in 1995,

which tragically took the lives of 168 people, including 18 of her 33 coworkers. Buried alive, she realized she had never truly lived. After her rescue, Amy embarked on a journey of self-improvement, which included her rise to become the organization’s President and award-winning CEO.

The day’s sessions ended with the fan favorite “Year in Review and Preview,” highlighting new KeyStone enhancements and KeyBoard winners. Attendees explored the Vendor Showcase throughout the day, focusing on partnerships and innovation.



The day concluded with a cocktail reception that provided a delightful setting for people to network.



The last day of the conference offered diverse topics in the Executive, Operational, Technical, and New Client Tracks, enabling participants to customize their experience based on their interests.

The Technical Track offered sessions for IT professionals familiar with coding and KeyStone technology, covering QA tips, Linux migrations, and SQL challenges. The Operational Track looked at KeyStone’s future, including merger preparations and innovative ways client partners used the KeyStone core. The Executive Track catered to leadership, focusing on organizational goals and credit union strategy. Lastly, the New Client Track provided tips for preparing clients for their conversions.

After the sessions concluded, guests dressed for the Roaring 20s and enjoyed dinner, a live DJ, and a speakeasy at the closing reception, marking a close to another memorable event. 🍷



CONTENTS

Highlights from the Client Conference.....	1	KeyStone User Group Community Unites.....	4
Note from the President.....	2	Partner Spotlight: Datava.....	4
Employee Spotlight: Susan Lloyd.....	2	Welcome New Clients and Client News & Success.....	5
Tips & Tricks: Reporting & Dashboards.....	3	Thank You, Conference Sponsors.....	6
Upcoming Trainings & Seminars.....	3	Conversiongram.....	7

Note from the President



Dear Friends,

I write this note on the heels of Father's Day, with a darling picture of my five- and three-year olds smiling at me from within a haphazardly glittered frame on my desk. Their adorable little faces and the thoughts of a day spent playing and cuddling and grilling have me smiling too, and it is these sentiments of joy and gratitude that I wish to extend to you as well. Maybe you are a dad yourself, or maybe you were able to celebrate the dads in your life, or maybe you just got to enjoy a pleasant summer Sunday in your own way – regardless we all have much to appreciate.

I for one am so fortunate as to work with my dad every day. Just his being there makes me want to work harder, to do better, to make him proud. But more than that it gives me plenty of opportunities to talk with him, to ask questions and seek advice and share ideas – certainly about work but also about the world at large. I get to learn from his words and from his example, and I get a daily reminder to consider how my own words and actions influence those around me.

In that way I find that paternal themes are actually universal. No matter if you're raising kids or contributing to the team at work, the way you carry yourself and interact with the various people and situations that provide the spice of life sets a tone for those around you, and it says more about what you believe in at your core than any words could ever articulate. Making sure that the impact you make is a positive one is both a tremendous opportunity and a great challenge, not least of which because your choices matter the most when things are not going well.

So no matter whether you're male or female or whether you've got kids or not, go out there and show the world who you are and what you believe in through the way you live your life. I promise that someone is watching, learning, and aspiring to be just like you. Just like I am with my dad.

Sincerely,
Rob Landis, President, Corelation Inc.

A handwritten signature in black ink, appearing to read "Rob Landis".

Employee Spotlight: Susan Lloyd, Senior Integration Analyst

San Diego native Susan Lloyd began her banking career after leaving college and began working at a local credit union. Over her 22-year tenure, she advanced from teller to managing multiple back-office departments. This extensive experience gave her a profound understanding of credit union operations, products, and values.

As a Senior Integration Analyst at Corelation, Susan finds great satisfaction in helping clients implement third-party processes during conversions. She supports her team and collaborates with vendor partners to enhance client experiences. The dynamic nature of her job keeps her engaged and challenged, something she truly loves.

"Working on conversions is so satisfying because every project brings a very distinct reward – a successful conversion!" said Susan. The unique nature of each conversion keeps her on her toes, and her years of experience remains a valuable resource for credit union partners and colleagues.



Since part of her role involves close collaboration with clients, she finds great joy in easing their workload whenever possible. "One of my favorite things to say to clients is 'We're going to make that better for you,'" Susan shared.

When she's not at work, Susan prefers the comforts of home, cherishing time spent with her family, which includes three senior dogs and her daughter's dog. She enjoys cooking, grilling, and baking, though she admits that sometimes a simple PB&J or a bowl of cereal hits the spot. Recently, she has developed a keen interest in British TV, particularly detective stories and crime dramas.

Susan's journey from a college student unsure of her path to a Senior Integration Analyst at Corelation is a testament to the power of experience and passion. At Corelation, Susan has found a place where she can thrive professionally while enjoying a balanced and fulfilling personal life. Thank you, Susan, for your invaluable contributions to Corelation and our credit union partners! 🍷

KeyStone Tips & Tricks: Reporting & Dashboards

Unlock the capabilities of the KeyStone database to uncover valuable insights that reveal growth opportunities, fine-tune strategies, and track progress. Informed decisions are the key to success, and your member data holds a wealth of information to boost confidence in decision-making and strategic planning. KeyStone offers a range of standard reports and dashboards through Jaspersoft, a customizable reporting and analytics platform, along with endless custom report possibilities, ensuring that real-time data is readily available whenever you need it. Optimize your workflow by scheduling reports and saving input controls, crafting tailored versions of the same report for different departments, ultimately saving valuable time.

Standard Dashboards

KeyStone provides a variety of standard dashboards fitted to different departments or roles, which can be modified by specific job functions. For instance, the CEO Dashboard provides a summary of annualized loan, share, asset, and membership growth at a high level. Conversely, the Branch Manager Dashboard dives into more granular insights, such as branch teller activity and loans originated within the last six months. With interactive [dashboards*](#), you can visualize your data in real time, enabling you to spot trends, identify outliers, and make data-driven decisions on the fly.

Standard Jaspersoft Reports

Standard reports comprise an extensive collection of pre-built reports bundled with KeyStone. These reports are effortless to implement and can be readily utilized without extensive setup, offering plug-and-play functionality. Additionally, users have the flexibility to configure custom report dashboards according to their specific needs.

Examples of categories covered in these Standard Reports include Compliance & Risk Management (e.g., fee reversals,

loans paid ahead, negative shares, OFAC detail, user privileges), Lending (e.g., bankruptcy, escrow analysis, charged and paid-off loans, participation balancing), and Operations (e.g., ACH reporting, bad addresses, share hold details, dividend rates, teller activity).

Access numerous reports [here*](#), and with each KeyStone release additional standard reports are added to ensure that your credit union's report library is kept up to date.

Ad Hoc Reporting

One of the key advantages of Jaspersoft is its user-friendly interface, designed to cater to both technical and non-technical users. With intuitive drag-and-drop functionalities, you can easily design and customize your reports to suit your unique requirements. Users have the option to create reports using a predetermined selection of fields. If you'd like guidance to get started, Corelation offers both on-demand and live classes for ad hoc reports training, empowering users to independently generate custom reports.

Custom Reporting

With a foundational grasp of SQL, you'll be equipped to formulate queries and craft nearly any report you desire using data in KeyStone. This capability allows you to extract a diverse array of reports from KeyStone's tables and fields. Corelation also offers comprehensive hands-on training with technical trainers, covering tips, best practices, and complex reporting topics.

KeyStone empowers credit unions with customizable dashboards, reports, and real-time access to critical data, driving informed decisions and growth. For an overview of all available reports training, go to [this page*](#) on Confluence. Embrace [your data's full potential](#) to propel your credit union forward. 📊

**Confluence access required*

Upcoming Training & Seminars

For the full list of upcoming Corelation training offerings and to register for courses, [click here](#). *(Confluence access required)*

Business Account Analysis

July 16th
12-1:30pm PST

KeyInsight with Cross-Sell

August 14th
12-1:30pm PST

Share and Loan Correction

September 11th
12-1:30pm PST

Back-Office Technical Training

KeyBridge Training

July 10-11 • September 11-12

Beginner Reports Training

July 9-11 • August 20-22
September 3-5

Advanced Reports Training

August 6-8

UI Scripting Training

July 23-25 • September 24-26

Batch Scripting Training

August 13-15

KeyStone Server Administration

July 31-August 1

Forms: General Usage

July 17 • September 4

Interested in Custom Training?

Our Technical Training & Education Services both offer custom training, available virtually or in-person!

Custom Technical Training

Choose a targeted list of technical topics from our available courses to determine your curriculum.

[Learn more](#) *(Confluence access required)*

Customized Training with Education Services

Select from our catalog of prepackaged sessions or let us create something unique for your credit union.

[Learn more](#) *(Confluence access required)*

KeyStone User Group Community Unites

At Corelation's 13th Annual Client Conference this year, the KeyStone regional user groups came together for a gathering designed to ensure everyone's voice could be heard. A total of 78 people attended, including nine board members from all five user groups. Meeting in person provided a valuable platform for discussions and networking among credit union professionals in the KeyStone community. Due to the geographical spread of the groups across the country, not everyone has frequent opportunities to interact or connect. Having this forum served as a valuable reminder to all that despite these distances, they are one large group with smaller, interconnected sections.

The day's agenda featured roundtable discussions and a few vendor presentations. Topics included non-interest income ideas, submitted tickets, various vendors in use, security breaches, and new Corelation releases. The forum fostered

open discussions and the collaborative approach allowed attendees to share insights and build on existing Corelation initiatives. The flexibility of the meet-up allowed for greater engagement as participants could discuss any topic they brought up, which kept the conversations dynamic.



The response to holding this meeting immediately after the Corelation Client Conference was very positive, with participants appreciating the dedicated platform to discuss conference sessions.



"Our main goal was to unify the user groups and create a stronger, constructive voice for the credit unions to convey the enhancement ideas we collectively feel will be impactful," shared Crystal Hegel, System Analyst of True North Federal Credit Union. "Many valuable connections were made, and we look forward to continuing this tradition each year."

As a result of the positive feedback, plans are in place to continue hosting similar meetings in the future, ideally alongside the Client Conference. This format ensures that all voices are heard in a unified setting, making it easier for participants to discuss common industry challenges and ways KeyStone can be used to help provide solutions.

If you're interested in joining any of the regional user-led [KeyStone User Groups*](#), please reach out to one of the board members via the email address listed on Confluence, or connect through the [community forum](#). 🗨️

**Confluence access required*

Preferred Partner Spotlight: Datava

The Imperative of a Robust Data Foundation for Generative AI Capabilities

For a full list of Corelation partners, [click here](#).

The future of credit unions is member-centric and AI-powered. Generative AI (GenAI) unlocks a world of personalized experiences, streamlined operations, and new revenue streams. However, to harness this power, credit unions must first establish a strong foundation of clean, unified data.

With their member-focused approach, credit unions possess vast amounts of transactional, behavioral, and demographic data. However, this data is often siloed, fragmented, or inconsistently formatted. Establishing a unified, clean, and accessible data infrastructure is crucial to ensure that AI models are trained on accurate, relevant, and holistic datasets, enhancing their predictive power and reliability.

Once a solid and fully activated data foundation is in place, credit unions can leverage GenAI to gain deeper insights into member behavior, predict future needs, and offer personalized services, enhancing satisfaction and revenue. This foundation should ensure seamless integration with other technologies, enabling efficient adoption and scaling of GenAI solutions, reducing time-to-market, and optimizing resource allocation.



"We value having one partner and one platform to manage, seamless integrations, secure technology, technology that grows with us, and increases employee performance and engagement. Datava aligns with these values."

Angie Crosby, VP, PMO of Launch Credit Union

Datava's End-to-End Data Activation Platform empowers credit unions with the robust data foundation required for GenAI capabilities and integrates seamlessly with Corelation's KeyStone. Unlike other solutions that only partially manage data, Datava oversees the entire data journey, from collection to activation, ensuring seamless and comprehensive data management.

When Launch Credit Union partnered with Datava they began establishing their data foundation by first streamlining

Goals and Incentives. They were thrilled to eliminate over 60 days of manual labor annually from VPs and Branch Managers and achieve 100% fully automated calculation accuracy. Motivated by these results, Launch Credit Union became a key investment partner and is now looking to leverage Datava for many other strategic data initiatives. They are well-positioned to embrace GenAI technology as it unfolds.

Learn more about how your credit union can partner with Datava to establish a fully activated data foundation and unlock the power of GenAI. Visit www.datava.com or email Taylor at tjoyce@datava.com 🗨️

Corelation Client News & Success

Alabama ONE™

Alabama ONE continues to grow their franchise and expand their use of KeyStone! In late 2023 into early 2024, the institution successfully converted yet another two credit unions and a 5-branch bank within a short 5-month timeframe. This followed multiple other core conversions successfully completed within the past few years. They have doubled their assets from \$561M to \$1.2b since initially converting to KeyStone in 2019. Their technology CUSO team has supported Alabama ONE's rapid expansion with seamless integrations, processing automation and cybersecurity protection, as well as establishing a data processing ecosystem that allows the credit union to focus on their everchanging business needs. The combination of key leadership, business decisions, and advanced technologies continues to drive growth and success for Alabama ONE.



Alabama ONE, based in Tuscaloosa, Alabama, is a one billion-dollar plus, full-service financial institution with 27 branches statewide, serving more than 90,000 Members across Alabama. Visit alabamaone.org for more information.



CommunityWide Federal Credit Union's continuous collaboration with Habitat for Humanity of St. Joseph County, Indiana has resulted in the honor of being named the Build Sponsor of the Year for 2023! Habitat for Humanity of St. Joseph County is a nonprofit dedicated to empowering families by fostering strength, stability, and self-reliance through housing. Partnering families work alongside volunteers to construct their homes and commit to an affordable mortgage. [Check out their contributions here!](#)



Welcome, New Clients

(Through June 7, 2024)

**Niagara's Choice
Federal Credit Union**
\$259 million in assets
Niagara Falls, NY



State Employees Credit Union
\$1.1 billion in assets
Santa Fe, NM



Honor Credit Union
\$1.6 billion in assets
Berrien Springs, MI



IAA Credit Union
\$372 million in assets
Bloomington, IL



**White Sands
Federal Credit Union**
\$398 million in assets
Las Cruces, NM



Conversiongram



Hawaii Community Adventure Begins



The Team at Alcoa Tenn FCU



The CEO of all Trades at Alcoa Tenn



Welcome US Community



Alcoa Tenn has a Corelation Conversation



All Smiles at US Community



The Hawaii Community FCU Ohana



The Whole Gang Ready to Convert at US Community CU



Back to the Future at Alcoa Tenn FCU



US Community CU Team



Alcoa Tenn Mortgage Team



Hawaii Community Conversion Ready



Hawaii Community Pep Talk

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