

# C O N N E C T I O N S

NEWS | UPDATES | INFORMATION

## Welcome New Clients

### Greater Alliance FCU

Paramus, NJ

\$207 Million | 22,203 Members



### Glendale Area Schools CU

Glendale, CA

\$389 Million | 11,389 Members



## Our Core Values



### CLIENT FOCUS

Act as an extension of our clients' teams, defining their priorities and opportunities as our own.



### TEAMWORK & COLLABORATION

Trust in the transformative power of collaboration with clients and partners to create lasting, high-value solutions. Share in celebrating our clients' success.



### EXCELLENCE

Take personal pride in every aspect of work, and do it in a way that leaves an enduring mark of excellence.



### INTEGRITY

Form lasting relationships built on honesty and trust, by honoring and delivering on commitments.



### INNOVATION

The best results are achieved by continually challenging the status quo and seeking to innovate in small ways or large.

## Words From the President

Dear Client Partners,

Last August, upon the sale of our digital banking division, we took immediate stock of the organizational initiatives crucial for our continued success. Among these was our desire to clarify and communicate WRG's team Core Values, Vision, and Mission Statement. In this Newsletter, I'm pleased to share those statements with you for the first time!

WRG has a long history of growth and innovation. In prior times, we had mission statements that highlighted WRG's leveraging of technology to reduce client costs, and our efforts to deliver exceptional member experiences through digital banking. But with significant changes to our business focus last year, and a reorganized team focused on Service Bureau and Tellerly, it was time to revisit the vision and mission

Any team's mission and vision can't be truly discovered without first knowing underlying core values of the team members. Those values can't be taught, but they're unmistakable in those who routinely practice them. So when we undertook the project, via an outside consultant, to interview team members about what matters most to them, we started with core values. Once we identified those, WRG's Mission and Vision naturally soon emerged.

It turns out that our team is daily driven by a desire to continually make things better and better on the systems and processes that we've built and support you with. At the same time, it became clear to us that personal relationships are integral to that — relationships with clients, colleagues, and business partners. The focus on these three elements — People, Products, and Processes — is a lens we often use for allocating our time and resources. Therefore, our newfound Mission seemed appropriate:

***Our Mission is to build ever-stronger relationships, systems, and processes that enable our clients to innovate and prosper.***

Our Vision for the future was adopted, in part, based on our appreciation for many of your comments about how we stand out as different from most service partners. Standing out in your view is an idea that motivates us. Therefore, we settled on a forward-looking Vision that captures this:

***Our Vision is to redefine what it means to be a technology partner in the service of credit unions.***

We're proud of this new Mission and Vision, and my commitment to you is to each day strive to practice them in all the ways we work for you. Similarly, with our Core Values, shown in the vignette, we will cultivate, communicate and celebrate these internally. And I trust that they will all be evident as you interact with us.

Thanks for your continued partnership and support. As stated in the Mission, we look forward to serving you in the years ahead in a manner that enables you to innovate and prosper.



Sincerely,

**Dave Cerwinski**  
President, WRG



**Employee Spotlight:**

**MARK MONSEES | Product Manager**

Mark returned to WRG in the role of Product Manager this past February after a two year hiatus. We are thrilled to bring Mark into this critical role that focuses on our products, but the position also involves client engagement. His primary role is to guide the direction and development of the features and service offers for Tellerly and UNITRI and act as a liaison between WRG and our clients. Mark will be hosting ad hoc meetings, topical webinars and participate in presentations to inform clients about new efficiencies, partnerships and value that we deliver every day.

Behind the scenes, Mark's recent focus has been enhancing the Tellerly product to allow Credit Unions to further transform their teller lines. This effort includes feature development and core integration for our Tellerly branch solution. Be sure to attend his upcoming webinar for current clients, as noted in the upcoming events section.

On a personal level, Mark enjoys bike riding and home improvement activities. He's especially proud of his two sons who both graduated from college this year.

WRG is fortunate to have the talent and Credit Union experience that Mark brings to our team.

**New Branch Feature Highlight**

One of the newest features that we are rolling out on Tellerly is Custom Screens – this allows you to push content out to the Verifone device to display to members. This can be in the form of a survey with either radio or push buttons. This information can be returned and stored in comments, tracking records or displayed on the tellers screen for immediate feedback. Any graphic can be used on this screen and pushed out to members which allows you to get creative and meet the unique needs of your members.



**Tellerly CORNER**

Development efforts this year have paid off. We're pleased to introduce the following new features for Tellerly:

- Card Re-pinning
- Custom Forms – survey responses, member feedback and more
- Core Integration to KeyStone
- Tap for contactless cards

**UNITRI CORNER**

Congratulations to **San Francisco Fire Credit Union** on accomplishing a significant project, a core conversion, conducted remotely and during this coronavirus era. And welcome to the WRG managed services team! We look forward to a strong partnership and serving your Credit Union as an extension of your staff.

**Mark Your Calendars**

- JULY 9** Tellerly for Symitar Webinar
- JULY 14** Tellerly Enhancements for Current Clients Webinar
- JULY 16** Corelation Webinar Sponsored by WRG

We sincerely value your business and thank you for your continued support and collaboration! —*Team WRG*



**Kerry Dolan Schiappa**  
Director of Sales & Marketing



**Patti Quinteros**  
Director of Projects & Implementations



**Amy Nguyen**  
Finance & Administration Manager



**Mark Monsees**  
Product Manager



**Sonia Safri**  
Client Services Manager