SHARETEC Q4 2023
NEWSLETTER

EMPLOYEE UPDATES

QUARTERLY SPOTLIGHT - *LAURA*

Laura Szymanski is our new and first-ever Chief Customer Officer (CCO)! She joins us with nearly a decade of experience leading customer and operational projects at United Airlines. Learn more about Laura and her new role here. Cheers to Laura!

NEW ADDITIONS TO SHARETEC

We're constantly growing and added some amazing new talent to the Sharetec family this past quarter, including:

Shannon Pickett
Professional Services Team

Laura Szymanski
Chief Customer Officer (CCO)

Shelly Robbins
Customer Success Support Team

Lucy Jean-Baptiste
Customer Success Team

David Lynch
Device Support Technician

Lindsey Skiles
Receptionist – Fort Wayne office

Allison Filek
Customer Success Analyst

ICYMI

LOGAN CACHE RICH PARTNERS WITH SHARETEC

Sharetec provides comprehensive core processing features for Loan Cache Rich Credit Union!

READ MORE

MERIDIAN CU & SHARETEC VELOCITY

Discover how Meridian CU increased financial wellness for its membership by using Sharetec Velocity's top-level products!

READ MORE

SHARETEC PARTNERS WITH LARKY

Sharetec & Larky partner to boost member engagement across hundreds of CUs!

READ MORE

HELP MEMBERS KEEP FINANCIAL RESOLUTIONS

Help your members keep their financial New Year's resolutions!

READ MORE

Q4 "SHARETECIVERSARIES"

A big cheers to all the Sharetec customers celebrating an anniversary with us in Q4:

OCTOBER

- Bar-Cons Federal CU
- Chicago's Bravest Credit Union
- Priority Plus FCU

NOVEMBER

- C&WJ Co-operative Credit Union Ltd.
- Winnebago Community Credit Union
- Texan Sky Credit Union

DECEMBER

- Illinois State Credit Union
- United Equity Credit Union
- Member Preferred Federal Credit Union

ANNOUNCEMENT

Oshkosh Community Credit Union Chooses Sharetec for its Compatibility

Sharetec, one of the fastest-growing leaders in the core processing space, has announced its partnership with Oshkosh Community Credit Union (OCCU) in Oshkosh, Wisconsin. The Wisconsin credit union, which serves residents and employees in Winnebago County, chose Sharetec's innovative core processing software after an extensive search.

Choosing new core software can be a worrisome undertaking for credit unions. When making this business-altering decision, OCCU had aspects to consider: Will this core be compatible with existing programs? Is the system user-friendly? Will accessibility to member information improve? After comparing three core systems, OCCU found that Sharetec answered 'yes' to all of these questions!

The major concerns that led Oshkosh Community Credit Union to explore new core systems included:

- Falling behind in modern core and digital technology
- Degrading customer service quality
- Challenging usability of the current system

"Sharetec's system is user-friendly, more information is provided on accounts, and it's compatible with other financial institutions we work with," explained OCCU President & CEO Jennifer Strange. "We were looking for compatibility and the feeling that we are as important as anyone else."

During the decision process, Sharetec provided OCCU with the answers they needed, made them feel secure, and followed up with them during the process. The credit union looks forward to seeing more member information and becoming more automated with its new core.

"The Sharetec team explained everything thoroughly and made us feel safe and secure during the process, as most of us have never done a Core Conversion before it is quite scary... but they reassured us," exclaimed Jennifer.

Specific features OCCU is excited about include the ability to scan its own checks, access to third-party integrations directly from the core, and Sharetec's Home Banking.

"There are several new products and services Oshkosh Community CU will now have access to, including Cross-selling, e-Receipts, Loan Payment Reversals, Dashboards, Collections, Indirect Lending, and more," stated Carrie Heck, Senior Account Executive at Sharetec. "This will add so much efficiency to their day, and we look forward to our partnership!"

FEATURED PRODUCT

SHARETEC VELOCITY NOTEBOOK:

WATCH NOW

THANK YOU for an Amazing Year!

ANNOUNCEMENT

Sharetec Signs on 22 New Credit Unions in 2023

Sharetec, a leading innovator in core processing software for credit unions, celebrated a record year, partnering with 22 new credit unions in 2023. Sharetec has made significant headway as a leader in the core processing space, attributing much of the company's success to fulfilling its mission statement: to provide bold, powerful software and be a caring partner.

The Interim CEO of Sharetec, Joe Viater, reminisced on the past year, stating, "We've made so many improvements in our operations at Sharetec. Our team is strong and is truly passionate about being a caring partner. We are here to help credit unions win, and our gains in 2023 are a testament to that."

A few noteworthy credit union signings from the year include Oshkosh Community Credit Union (OCCU), Fond du Lac CU, and Logan Cache Rich CU. CEOs from each institution voiced their reasons for choosing Sharetec and their positive conversion experience.

"Sharetec's system is user-friendly, more information is provided on accounts, and it's compatible with other financial institutions we work with," explained OCCU President & CEO Jennifer Strange. "We were looking for compatibility and the feeling that we are as important as anyone else."

Lorri Heimberg, VP at Fond du Lac CU, stated, "We ultimately decided on Sharetec for a few reasons...[and] last, but definitely not least, the communication and education provided by Carrie Heck and the Sharetec team has been top-notch. They truly care about learning and providing what our Credit Union needs. We are looking forward to growing with them in the future."

"We chose Sharetec because it had all the features we were looking for while being user-friendly," stated Jordan Burdge, CEO of Logan Cache Rich CU. "The executive team spent time meeting with me on a call to address questions...they provided frequent communication without being overbearing."

Sharetec's record-breaking year also comes in tandem with the widespread release of Sharetec Velocity. Sharetec Velocity, a truly web-based core, enables credit union leaders to access the core anywhere and anytime. It is easy to use and flexible, accommodating credit unions of any size with its unlimited scalability. This web-based core also comes packed with cutting-edge features, such as Notebook, Sharetec's integrated CRM solution, advanced analytics, and an Open API, enabling CUs to leverage the ancillary products they specifically require.

"This is our best year to date, to my memory," stated Sarah Lambert, Interim VP of Growth at Sharetec. "Our success team has grown, as well as other key departments, which really made the difference...."

2024 SHARETEC USERS CONFERENCE

REGISTER For 2024!

This year's Users Conference will take place September 8 – 11, 2024 in Frisco, Texas!