

Contact Center Ensures Smooth Card Activation for Thousands of Newly Acquired Accounts

What this means to you ...

Look for a nimble, proactive service provider. When it comes to reaching account holders with important, time-sensitive or urgent messages, it's imperative to work with an experienced team. Harland Clarke's Contact Center is a professional, reliable resource for outgoing calls.

Take advantage of onboarding opportunities. A personal welcome goes a long way to making a positive first impression. This type of communication strengthens new relationships and paves the way for future account lifecycle communications.

Maintain account holder satisfaction during acquisitions. It's important to ensure that new account holders enjoy a smooth transition and uninterrupted access to their funds. With daily reports and "voice of the customer" feedback via the Harland Clarke Contact Center, financial institutions can stay abreast of customer concerns during the transition process and take action when necessary.

Contact Center outbound calling is just one example of how Harland Clarke provides insight-driven, multichannel solutions throughout the entire customer lifecycle. We create meaningful interactions to help maximize the full value of every customer relationship.

Background

A regional bank headquartered in North Carolina had acquired four banks over an 18-month period. These acquisitions resulted in reissuing debit and ATM cards to thousands of newly acquired account holders. A third-party card issuer handled this process via mail.

To ensure that new account holders did not experience any interruption in access to their funds, the bank needed a way to remind them to activate their debit and ATM cards by a specific date.

Because of the acquiring bank's longstanding relationship with Harland Clarke, it was aware of Harland Clarke's Contact Center capabilities and award-winning customer service.

Challenge

The bank wanted to extend a warm welcome to its newly acquired account holders with an outbound phone call and reminder about the card activation process and deadline. But time was of the essence. If account holders didn't activate cards promptly and therefore didn't have access to their funds, it would reflect poorly on the bank and negatively impact the new banking relationship.

The situation became considerably more complicated and even more time-sensitive when it was discovered that the third-party card issuer had mailed new debit cards without PIN numbers to 2,000 customers. These account holders needed to be notified immediately of the error.

Solution

Harland Clarke Contact Center worked closely with the bank to fine-tune scripts and contact strategies and test samples of new account files to ensure smooth data imports prior to each of the four acquisitions. Once the acquisition dates arrived and the new debit and ATM cards were in the mail, the Harland Clarke Contact Center immediately launched a six-day call campaign for each of the four banks. Each new bank had between 1,100 and 17,000 accounts.

During each six-day campaign, Harland Clarke communicated daily with the bank, providing immediate updates and reports on the status of each account holder's receipt of a new debit card and PIN. This immediate feedback enabled the bank to take immediate action if necessary.

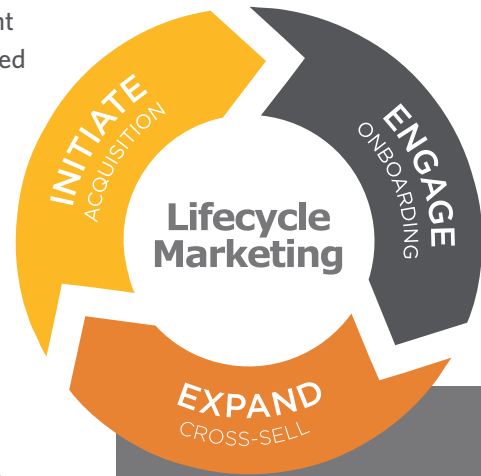
In the case of the missing PINs, the Contact Center quickly changed the call script and created a seamless call hand-off to the bank if the account holder needed to interact with the bank's customer service personnel directly.

Results

In a very short timeframe, Harland Clarke successfully reached the bank's newest customers, welcomed them to the bank and encouraged them to activate their new cards. The bank was very confident in the Contact Center's expertise, and was particularly impressed by the speed with which the Contact Center addressed the urgent needs of the 2,000 customers with missing PINs. Thanks to Harland Clarke's assistance, inbound queries to the bank about new card activations were minimized. The bank appreciated the Contact Center's exceptional flexibility and professionalism.

Many variables impact marketing campaign success. The information on earnings or percentage increases that is contained within this case study is provided for demonstrative purposes only. Harland Clarke does not guarantee or warrant earnings or a particular level of success with a campaign.

To learn how Harland Clarke can help your financial institution increase marketing ROI by developing satisfied, profitable and loyal account holders, contact your Harland Clarke representative. Call **1.800.351.3843**, email us at contactHC@harlandclarke.com or visit our website harlandclarke.com/marketing.



Harland Clarke's Lifecycle Marketing Solutions — powered by advanced analytics, insightful data and award-winning creative designs — drive engagement and profitability at every stage of the account holder relationship.

Through effective acquisition, onboarding and cross-selling strategies, we help our clients achieve primary financial institution status with their account holders.

Acquisition

Reach prospects with targeted, effective communications that encourage new account openings and set the foundation for strong relationships

Onboarding

Use relevant account holder data to deploy multichannel communications that effectively transition new account holders into satisfied, loyal customers

Cross-sell

Increase the number of household products to capture full profit potential