

Flexible Outsourced Contact Center Support Critical to Online Banking Conversion Success

Background

Known for innovation and account holder service, a large bank with hundreds of locations across the western United States decided it was time to upgrade to a new online and mobile banking platform.

Challenge

The bank knew an initiative of this magnitude would prompt more account holder calls than their staff could handle. With their reputation and account holder loyalty on the line, they looked for ways to manage high call volume; quickly and efficiently deliver account holder verifications, user troubleshooting and navigation assistance; and provide help with passwords.

Solution

After a thorough review of options, the bank chose Harland Clarke's Contact Center Solutions (CCS) Burst to augment their staff during the conversion. The CCS team customized a plan and processes that provided the bank extra capacity and flexible staffing arrangements for their anticipated call volume. Training designers worked with the bank to develop custom materials and train-the-trainer sessions to ensure CCS specialists adhered to protocols and processes and provided outstanding service. Call calibration to verify calls were consistently monitored and scored, allowing CCS to incorporate updates and key learnings into ongoing training sessions.

The CCS approach worked so well that the bank requested they transition from online banking conversion support to general queue support. CCS cross-trained their entire team of dedicated specialists to support all call types without compromising high-quality, high-touch account holder experiences. Throughout the conversion and general queue support, CCS provided comprehensive project oversight, including frequent feedback and reporting to the bank.

The success of the conversion led the bank to use CCS for subsequent initiatives, including a mortgage platform conversion and an outbound calling program. Each time the bank requested additional support, CCS responded quickly and adapted to meet their changing needs.

Results

Over a one-year period, the Harland Clarke CCS team achieved target service levels. Answer rates often hit 93 percent or higher, despite widely variable call volumes.

Project Highlights

- Custom training
- Call calibration
- Comprehensive oversight and reporting
- Target service levels met
- 93+ percent answer rates



What This Means to You

The way inbound and outbound calls are handled can greatly influence a financial institution's reputation and account holder or member satisfaction. Many institutions lack the staff to handle fluctuating call volumes or arrival patterns, especially during digital conversions, mergers and acquisitions, or other inbound programs. Harland Clarke's CCS Burst solution is a professional, cost-effective approach to ensuring customers consistently receive the brand and service experiences they expect and financial institutions enhance relationships and improve operational efficiency.

Harland Clarke's Burst solution provides:

More short-term bandwidth and flexibility. Our Burst solution makes it easy to handle temporary increases in call volume without hiring extra employees or risking negative customer experiences. We adjust the number of specialists and operational hours as needed. This targeted, short-term solution requires no long-term commitment.

Immediate capacity. The CCS Burst solution lets financial institutions add more resources without taking up more physical space.

Higher levels of customer satisfaction. Customers appreciate being acknowledged promptly and professionally, and getting help when they have problems. Our CCS team provides the same high service levels as your internal team.

Stronger customer loyalty. A well-executed conversion is a crucial link in the chain of customer relationship-building. Our CCS team handles conversions and other short-term events to complement the entire customer relationship.

Efficient resource use. Banking professionals can't do it all. We relieve your staff of banking conversion tasks so they can be more productive and focus on what they do best.

Experience and professionalism. Harland Clarke represents your brand in a world-class way. Our CCS team is proud to be an extension of your company.

Working with Harland Clarke's CCS team seamlessly extends your staff, increasing your agility and bandwidth. Let our professionals take care of logistics while you focus on customers.

To learn how Harland Clarke can help your financial institution connect with account holders, call **1.800.351.3843**, email us at contactHC@harlandclarke.com or visit harlandclarke.com/BURST.

About Harland Clarke's Contact Center Solutions

- B2B and B2C inbound and outbound capabilities
- More than 20 million contacts managed per year
- More than 55,000 contacts managed per day
- Locations: San Antonio, Salt Lake City, Puerto Rico
- 1,000 production stations with ready capacity
- 850 highly skilled sales and service professionals
- English, Spanish and French Canadian languages
- 100% call recording
- Chat and email service
- Stringent logistical and physical security features

Many variables impact 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.