

# Outbound Calling Program Personally Welcomes Members to New Branch

## What this means to you ...

Financial institutions often lack the internal resources to undertake outbound calling campaigns, and yet they are a very effective way to connect with members. A welcome call is just one example of how to build a series of meaningful interactions with account holders to cultivate valuable and long-lasting relationships.

Working with the Harland Clarke Contact Center Solutions team makes sense — whether on a smaller, quick campaign or on a longer-term commitment — when your organization needs an efficient, professional team uniquely skilled to conduct outbound calls.

**Speed counts.** Our Contact Center Solutions Team is nimble and can get your campaign up and running quickly.

**Personal is preferable.** Account holders like hearing from your financial institution, whether you are sharing good news, providing updates or communicating changes. A personal call is a great way to build rapport and loyalty.

**Professionalism is key.** Our Contact Center specialists' only job is to take the same great care of your account holders as you would. They are efficient, highly-trained and dedicated professionals who are experienced with all types of campaigns, from simple announcements of new branch openings to sophisticated cross-sell initiatives.

### Background

With nearly \$700 million in assets, U.S. New Mexico Federal Credit Union is the oldest credit union in the state of New Mexico, serving members since 1935. Headquartered in Albuquerque, U.S. New Mexico was about to open its newest branch nearly 200 miles away in Farmington. The credit union did not have a branch presence in that part of the state, but did have 1,242 members with car loans only, who lived nearby.

### Challenge

Known for its warm and friendly member service, the credit union was interested in cultivating a deeper relationship with its existing members living near the new branch. U.S. New Mexico recognized that the branch opening was an ideal opportunity to nurture the existing relationship with members and grow its business.

In addition to sending direct mail, the credit union wanted to personally contact its existing members, but had limited resources to make calls after business hours and on weekends — the optimal time to reach them. U.S. New Mexico considered having branch personnel make the calls, but was concerned that this was not their area of expertise, that the conversations might not deliver the same information consistently, and that other tasks might take a higher priority. It was important that branch personnel stay focused on taking care of existing account holders.

It was also imperative that the calls were executed quickly to coordinate with the branch opening. Efficient call tracking and reporting was also a must.

### Solution

Financial institutions often lack the internal resources to undertake outbound calling campaigns, though such campaigns are a very effective way to connect with account holders. Harland Clarke's Contact Center Solutions team executed a targeted outgoing informational campaign conducted by its professional call specialists.

The intent of the informational call was twofold. It was designed to notify members of the convenience of having a branch in close proximity, and leverage the opportunity to build awareness about the portfolio of services the credit union offers by inviting members to stop by when the branch opened.

The campaign was launched quickly and effectively. The Contact Center Solutions team worked closely with the credit union to develop a script, FAQs and training materials. Upon completion of training, the Contact Center call specialists made three attempts to reach each account holder during the course of one week.

In order to eliminate any duplicate calls to members with multiple accounts, the Contact Center Solutions team developed a customized function that provided call specialists with access to all needed account information on a single record for each member relationship.

The Contact Center Solutions team provided daily updates to the credit union, reporting on the progress and success of the campaign and detailing actionable, anecdotal feedback received from members.

## Results

The Contact Center Solutions team worked as a seamless extension of the credit union, providing the same warm and friendly customer service the institution is known for, but without taking branch personnel away from their ongoing responsibilities.

The campaign achieved the following results:

- **2,694 total attempts** made by the Contact Center call specialist team in one week — up to three attempts per household
- **67 percent of the targeted list was informed** about the new branch, either through a conversation or in a scripted message delivered via voice mail
- **610 completed calls** in which a call specialist spoke to a member about the new branch
- **233 additional messages** delivered via voice mail on the final dial attempt

In addition to learning that members in the Farmington area were very enthusiastic about having a new branch nearby, U.S. New Mexico also learned that many members expressed interest in credit cards and other types of loans through the credit union.

“These calls were a reinforcement of our brand,” said U.S. New Mexico Marketing Manager Phil Forbert at the end of the campaign. “Harland Clarke was very easy to work with — they really understood our intentions and executed the campaign as expected. The plan was well thought-out, the execution was well delivered, and the reporting was well segmented. I’d highly recommend the Harland Clarke Contact Center. They’re at the top of our list for an outgoing call campaign.”

Consider Harland Clarke’s Contact Center for an upcoming campaign. Working with us is an easy, efficient way to reach your marketing goals.

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 connect with account holders, contact your Harland Clarke representative. Call **1.800.351.3843**, email us at [contactHC@harlandclarke.com](mailto:contactHC@harlandclarke.com) or visit our website [harlandclarke.com/contactcenter](http://harlandclarke.com/contactcenter).



*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