

# Inbound Call Support Eases Online Banking Transition for Thousands of Customers



## Background

Community banks pride themselves on building lifelong relationships by actively listening to their customers and providing world-class financial expertise and solutions that fit their account holders' personal banking needs.

In response to feedback received directly from its customer base, one community bank with almost 150 years of banking experience decided to change its online banking application provider. This switch required all online banking clients to go through a potentially complicated, multistep conversion process.

## Challenge

The bank anticipated a substantial increase in inbound call volume when clients accessed their account information for the first time following the online conversion. The bank knew it was critical to be available and provide knowledgeable support to its account holders as the conversion took place.

The bank's own customer service group was not staffed to scale up and down to meet the anticipated spikes in inbound call volume for the relatively short duration of the conversion. The bank was also hesitant to reassign internal personnel away from their usual tasks to handle the increased volume.

Despite these staffing constraints, the bank was committed to making the transition smooth and painless for clients. They wanted to be able to provide prompt and professional assistance during the conversion process and avoid long hold times or frustration resulting from unresolved issues. But they knew that this would require spending the necessary amount of time with each client to ensure a positive transition experience.

## Solution

The bank turned to the Harland Clarke Contact Center Solutions team to provide a scalable inbound call support team as a seamless extension of the bank. Based on experience, the bank was confident that the Contact Center Solutions team had the superior skill set required to professionally and accurately guide customers through the conversion process.

## Conversion at a Glance ...

- 17,000+ calls answered
- 97.9 percent answer rate
- 13.8 second average answer time
- 85,000 affected customers
- Quick ramp up and ramp down
- Cost effective

The Contact Center Solutions team worked closely with the bank to understand the online conversion process and the potential questions that would arise. This knowledge was then applied to building a robust team of sophisticated call specialists with the qualifications to provide support at the highest level of expertise. The team was sized to ebb and flow with the inbound call volume.

To ensure quick and thorough problem resolution, the bank granted Harland Clarke access to its account holder data so that the call specialists would have the necessary information at their fingertips to assist clients. The Contact Center Solutions team provided daily updates to the bank, reporting on the progress and success of the campaign and detailing anecdotal feedback received from customers.

## Results

The Harland Clarke Contact Center Solutions team handled the inbound call volume throughout four phases covering 20,000 to 35,000 customers each. Support quickly ramped up and down to accommodate the changes in call volume.

Call specialists answered more than 17,000 calls over the course of 12 weeks during traditional and non-traditional hours, with a remarkable 97.9 percent answer rate. Calls were answered very quickly — in 13.8 seconds, on average.

The Contact Center Solutions team acted as a seamless extension of the bank, providing the same warm and knowledgeable customer service the bank is known for while freeing the bank's internal team to focus on their primary duties. This ultimately resulted in a positive customer experience, short hold times, ready bandwidth for the bank, and a smooth conversion.

## What this means to you ...

Financial institutions often lack the internal resources to manage calling campaigns. Yet such campaigns are among the most effective ways to connect with customers, especially when the customers are raising their hands for assistance.

Working with Harland Clarke's nimble Contact Center Solutions team provides:

**Higher levels of customer satisfaction.** Account holders appreciate being acknowledged promptly and professionally, and assisted when they experience difficulties. Our Contact Center Solutions team mirrors the same high levels of service that your internal team delivers.

**Stronger customer loyalty.** A well-executed conversion is just one link in the chain of customer relationship building. Our Contact Center Solutions team handles conversions and other short-term events in a way that complements the entirety of the customer relationship.

**Instant bandwidth and flexibility.** Our Contact Center Solutions team makes it easy to handle temporary increases in call volume without hiring extra employees or risking negative customer experiences due to increased hold time. We adjust the number of specialists and operational hours required as the project demands.

**Immediate capacity.** Our solution enables financial institutions to handle projects requiring additional resources without taking up additional physical space.

**Efficient use of resources.** Banking professionals can't do it all. Relieving your staff of the crucial tasks that accompany banking conversions instantly enables them to be more productive and focus on what they do best.

**Experience and professionalism.** There are partners who can represent your brand in a world-class way. Our Contact Center Solutions team is a group of sophisticated professionals who are proud to be an extension of your company.

Working with Harland Clarke's Contact Center Solutions team provides your institution with a seamless extension of your own team, increasing your agility, bandwidth and core strengths. Let our professionals take care of the logistics while you continue to focus on your customers.

*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.*



Harland Clarke  
**Lifecycle  
Marketing**

*Harland Clarke provides best-in-class solutions throughout the entire account holder lifecycle — from acquisition to onboarding to cross-sell. We utilize insight-driven strategies across multiple channels to help you maximize the value of each account holder relationship.*

To learn how Harland Clarke can help  
your financial institution connect with account holders,  
call **1.800.351.3843**, email us at  
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