

## CASE STUDY

# Short-Term “BURST” Inbound Call Support Eases Online Banking Conversion for Premier Financial Services Company

### Background

To enhance the security of personal and account information for its online customers, one of the nation’s premier financial services companies, with \$60 billion in assets and a collection of several hundred banks strategically located in high-growth markets across more than 10 states, switched to a new online banking applications provider. This change required all banking customers using Quicken® or QuickBooks® to go through a multi-step conversion process.

### Challenge

While the institution was committed to ensuring a smooth and painless transition for its customers, it wasn’t staffed to handle the anticipated short-term increase in inbound call volume during the conversion. Nor was it able to reassign knowledgeable staff away from their usual duties to handle calls.

**7,500+** calls answered during traditional and nontraditional banking hours

**92%** answer rate

Program support quickly ramped up and down

Cost-effectively added short-term inbound call-handling capabilities

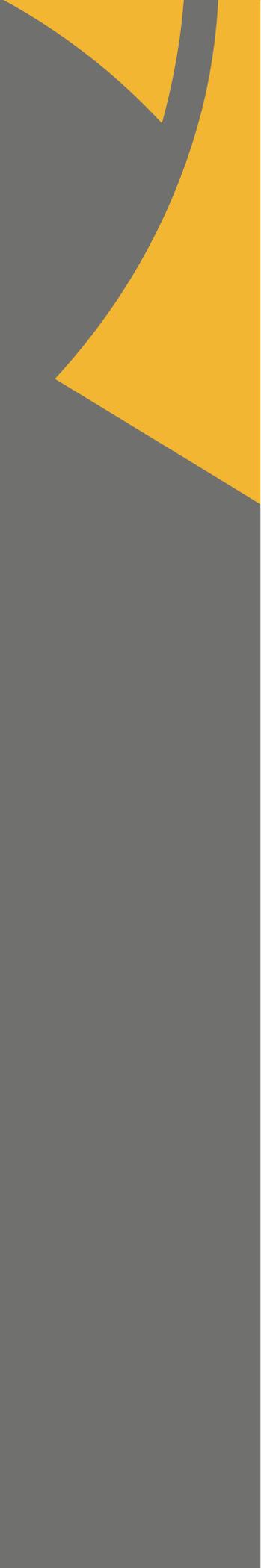
It needed a seamless augmentation of its internal customer service team to:

- Provide prompt and professional assistance, including one-call resolution whenever possible, on a short-term basis
- Avoid long hold times (and the ensuing frustration)
- Spend the appropriate time with each customer to ensure a positive experience

### Solution

The institution had enjoyed a healthy collaboration with Harland Clarke Contact Center Solutions (CCS) for more than 35 years. With this track record of success, Harland Clarke was a natural place for the institution to turn to provide a short-term, flexible solution from a trusted resource.





Prior to beginning the conversion, the institution granted Harland Clarke CCS access to account holder data so that specialists could immediately locate the necessary information to assist customers.

In addition, Harland Clarke and the institution collaborated on a plan to handle increased call volume and to accurately and professionally guide customers through a potentially complex conversion process. This involved creating a core team capable of scaling up and down quickly to meet fluctuating call volumes, and training professional contact center specialists to provide support at the highest level of expertise.

A team of sophisticated call specialists was selected to handle the calls, and the Burst solution from Harland Clarke was launched quickly and effectively.

### **Results**

During the five weeks of the conversion, Harland Clarke's CCS Burst experts answered more than 7,500 calls during traditional and nontraditional banking hours, with an answer rate of 92 percent.

The Burst team quickly flexed up and down to accommodate call volume and cost-effectively supported the bank's customer service needs while freeing the bank's internal team to focus on escalated inquiries.

The Burst team also provided daily updates to the bank, reporting on the progress and success of the program and detailing anecdotal feedback received from customers.

Overall, the program achieved:

- A positive customer experience
- Short hold times
- Instant bandwidth for the bank
- A smooth conversion

### **What This Means to You**

Online conversions and other changes (mergers and acquisitions, natural disasters, branch openings and closings, etc.) that affect account holders often result in a significant increase in call volume over a short period of time. This can put financial institutions in the untenable position of having to outsource their contact center for a short period of time but not being able to find a provider they can trust or who is willing or able to assist in the short-term. They fall into the "all or nothing" trap.

To enable your employees to focus on what they do best, consider working with a team that can skillfully manage the strategic planning and execution of conversions and other short-term scenarios.

Harland Clarke's nimble Burst solution, performed by our Contact Center Solutions experts, can professionally and cost-effectively step in to handle calls, even the most sophisticated and technically challenging inquiries, while ensuring your account holders receive the brand experience as they would from your own staff.

For financial institutions seeking call center support, Harland Clarke's Burst solution provides:

**Instant, short-term, flexible bandwidth and capacity.** Our team ramps up quickly to handle temporary increases in call volume without the financial institution having to hire or provide space for temporary employees — or risking negative customer experiences due to increased hold times.

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

**Strong customer loyalty.** When account holders feel valued — knowing decisions are made in their best interest and assistance is accurate and accessible — their loyalty is immeasurable. A well-executed conversion is just one link in the chain of account holder relationship-building. Our Burst solution quickly and expertly handles complicated conversions in a way that complements the overall banking relationship.

Remember, expertise counts. Because of our financial industry focus, Harland Clarke has the expertise to represent your brand in a world-class way. Our CCS Burst team is a group of sophisticated professionals who are proud to be an extension of your institution. Let us take care of the logistics while you continue to focus on your account holders.

*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,

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 capabilities
- Stringent logistical and physical security features