

## 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 meet their account holders' needs.

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

### Challenge

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

The bank's 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 needed. The bank was also reluctant to reassign personnel away from their core tasks to handle phone calls.

Despite these staffing constraints, the bank was committed to making the transition smooth and painless for its customers. The bank was eager to provide prompt and professional assistance and avoid long hold times or frustration resulting from unresolved issues. The bank realized this would require spending the necessary amount of time on each call to ensure a positive customer experience.

Quick ramp up and  
ramp down

**17,000+** calls  
answered

**97.9%** answer rate

**13.8** seconds average  
answer time

**85,000** affected  
customers

Cost-effective



## **Solution**

The bank turned to the Harland Clarke Contact Center Solutions (CCS) team to implement our Burst solution — a flexible way to augment the bank's call support staff for short-term engagement. Based on experience, the bank was confident the Harland Clarke CCS team could seamlessly handle the assignment, acting as an extension of the bank's staff to professionally and accurately guide customers through the conversion process.

Harland Clarke worked closely with the bank to understand the online conversion process and the potential questions that would arise. This knowledge was applied to building a team of dedicated and experienced call specialists to provide support at the highest level of expertise. The team was sized to flex with inbound call volume.

The bank granted Harland Clarke access to its account holder data so the team would have the necessary information to ensure quick and thorough problem resolution. (Harland Clarke understands the risks involved in granting third-party access to data, and we take our security responsibilities seriously. That's why we are adamant about meeting all regulatory, compliance and security requirements.) The CCS team provided daily updates to the bank, reporting on the progress and success of the campaign, and relaying anecdotal feedback received from customers.

## **Results**

Utilizing our Burst solution, the Harland Clarke CCS team handled inbound calls through four phases of the online conversion, covering between 20,000 and 35,000 customers each. Our support ramped up and down quickly to accommodate fluctuations in call volume.

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

The Harland Clarke 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 core duties. This 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 outbound and inbound call campaigns, and yet they are among the most effective ways to connect with customers, especially during periods of change. 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 they would from your own staff.

Harland Clarke's Burst solution provides:

**Augmented 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. Our Burst solution can adjust the number of specialists and operational hours required as the project demands. It is a targeted, short-term solution with no long-term commitment necessary.

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

**Higher levels of customer satisfaction.** Customers 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.

**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.** Harland Clarke can represent your brand in a world-class way. Our CCS team is a group of dedicated professionals who are proud to be an extension of your company.

Working with Harland Clarke's CCS team provides your financial institution with a seamless extension of your own staff, increasing your agility, bandwidth and core strengths. Let our professionals take care of the logistics while you continue to focus on your 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 capabilities
- Stringent logistical and physical security features