

## Short-Term Contact Center Solution Helps Create Seamless Customer Experience During Digital Conversion

### Background

A credit union in Southern California with a long history of exceptional customer service made the decision to move to a different platform to meet members' changing needs and expectations. The new platform would enable personalized solutions for how, when and where members bank and integrate experiences across desktops, smartphones and tablets.

### Challenge

Personal service is a hallmark for the credit union, whose members live in a two-county area. Their goal was to transition members to the new online and mobile banking platform as seamlessly as possible, but they realized many people would have questions the first time they accessed their accounts after the conversion. The credit union did not have enough capacity to handle the expected increase in call volume without taking staff away from their usual duties, which could compromise service in other areas. Because they estimated the spike in call volume to last only a few weeks, it didn't make sense to hire permanent staff or invest in training temporary workers.

### Solution

Based on a recommendation from their new online and mobile banking provider, the credit union contacted Harland Clarke's Contact Center Solutions (CCS) team, and learned about Burst, an efficient way to augment capacity without a long-term commitment. The CCS team met the credit union's requirements for specialization and experience in financial services, the ability to customize a program and the flexibility to scale up or down based on call volume. Harland Clarke's CCS team also demonstrated their understanding of the risks in granting third-party access to data. They follow stringent physical security protocols and adhere to all regulatory, compliance and privacy requirements, assuring the credit union of the security of personal and account information for online and mobile banking users.

**3-week**  
conversion period

**5,200+**  
calls answered

**96.7%**  
answer rate

**20 seconds**  
average answer time

**36,000**  
potentially affected  
customers



The CCS team worked with the credit union to assess their needs and recommend a custom, multichannel contact center program to help members through the conversion quickly and efficiently. After agreeing on the program, the Harland Clarke CCS team worked closely with credit union staff to prepare for the conversion, immerse themselves in the credit union's brand and train on the conversion process and potential questions that could arise. All preparation was geared toward providing prompt, accurate, high-quality service to every member to ensure a seamless experience and high retention for future business growth.

### **Results**

Over a three-week period, the Harland Clarke CCS team handled 5,200 inbound calls with a 96.7 percent answer rate. They answered calls within 20 seconds, on average, and provided high-quality member experiences consistent with those delivered by the credit union's own staff.

### **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 volume, especially during digital conversions, acquisitions, marketing or other inbound or outbound 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 account holders.

### **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

To learn how Harland Clarke's BURST can help your financial institution **deliver a seamless experience**, to account holders during digital banking conversion or change event, call **1.800.351.3843**, email us at **contactHC@harlandclarke.com** or visit **harlandclarke.com/BURST**.

*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.*