

CASE STUDY

OnPoint Community Credit Union  
Creates Winning Conversion Customer  
Experience with ContactCenterCX<sup>TM</sup>

**357,000**  
members

**59,156**  
calls handled

**67%**  
conversion rate

*“They told us what they recommended, what they didn’t recommend, but they left the decisions up to us.”*

CHALLENGE

OnPoint Community Credit Union, the largest community-owned financial institution in Oregon, sought help in converting over 227,000 loyal online banking users to their latest online banking platform. For this conversion, OnPoint’s biggest priority was to deliver on their brand promise of providing extraordinary experiences and value to the community they serve. Thus, they began their hunt for a strategic supplier to assist with their conversion and found their way to Harland Clarke.

SOLUTION

OnPoint Community Credit Union already knew they needed a supplier for their conversion, but they were looking for the right supplier. OnPoint sought a supplier able to provide a strong client-focus with experience in adapting to the credit union’s existing operations and culture. Because delivering an exceptional member experience is a core value for OnPoint, they were also looking for a supplier with conversion experience and a commitment to serving as an extension of the institution’s brand.

“Putting trust and faith in another company is hard,” said Roberta Davis, Eservices Delivery Coordinator for OnPoint Community Credit Union. “But we had learned from our last conversion when we managed everything in house and knew we wanted to learn more about Harland Clarke.”

When the team expressed initial concerns about OnPoint and Harland Clarke staying aligned while providing the service their members expect, Harland Clarke invited OnPoint to visit their contact center – in person – and see the “Harland Clarke Difference” for themselves.

“My impression of being there is that it’s a very well-run contact center,” explains Aryne Evey, OnPoint Community Credit Union’s Member Services Manager. “Seeing the well-oiled machine really solidified our decision.”

## RESULTS

It wasn’t just the well-run contact center that caught OnPoint’s eye. Harland Clarke’s expertise in running hundreds of conversions for financial institutions of all sizes brought the added benefit of a knowledgeable and trusted supplier to OnPoint’s second conversion.

When conversion go-live occurred, OnPoint Community Credit Union experienced more call volume than anticipated. “We switched it so that all of our calls went to Harland Clarke and they triaged and sent back to us,” Davis recalls. “We were able to make changes rapidly as needed.” Outsourcing contact center functions to Harland Clarke provided added peace-of-mind for OnPoint, while ensuring their members received the best possible experience. “It helped us to know our members weren’t getting a busy signal when calling us,” Davis adds.

In the end, the conversion was a success. “Really a key to our success is that we worked with Harland Clarke,” Roberta Davis says. “We really did let go of our grip and trusted the organization and their guidance.”

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*With a higher adoption rate than anticipated, over **152,000 members**, roughly **67%** of their online banking user base converted to OnPoint’s new online banking platform.*

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*Many variables impact marketing campaign success. Information percentage increases 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.*

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## THE HARLAND CLARKE DIFFERENCE

At Harland Clarke, a single strategy defines everything we do. We help organizations connect with their customers how, when, and where it matters throughout the entire relationship lifecycle. Our Payment and Marketing Services drive customer engagement in every relevant way across channels to increase acquisition, improve activation, deepen relationships and retain them for the long term. We are invested in giving our clients a distinct advantage in today’s experience economy. With Harland Clarke as your partner, you have a single, trusted source to help advance your strategic business growth and ensure enduring success.

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