

CASE STUDY

“White Glove” Treatment and “Flawless” Digital Conversion Yields 95% Satisfaction Rate

“Thank you for investing in a customer experience that correctly anticipated what kind of support people might need and following through with very helpful and well-trained people.”

Columbia Bank Client

95% of survey respondents reported they were satisfied with their Harland Clarke dedicated support specialist

BACKGROUND

Columbia Bank is a full-service commercial bank with more than 150 branches across three states in the Northwest. The financial institution was keen to ensure a smooth transition for its 25,000 commercial banking, treasury management and small business clients during an upcoming digital conversion.

SOLUTION

The bank, aware of how changes to the digital experience can cause disruption and customer frustration, enlisted the help of Harland Clarke. ConversionCXTM supports financial institutions through customer-facing change events and technology changes such as digital banking platform conversions. The solution helps financial institutions manage the customer experience surrounding the conversion event, turning potentially disruptive events into opportunities to boost client satisfaction, increase retention and ensure full monetization of the system or platform.

Pre-launch, Harland Clarke collaborated with the bank to design a personalized migration experience for each client segment. Specialists reached out to each client to ensure they were aware of the upcoming conversion, the benefits of the new platform and prepared for the transition. In addition, some clients received “white glove” concierge service, including step-by-step guidance on navigating the new experience and executing transactions. Harland Clarke also provided inbound overflow support and post-conversion support for all clients before transitioning support back to Columbia Bank.

RESULTS

The conversion was a remarkable success according to Columbia Bank, and, most importantly, its clients. Remarked Ann Higgins, SVP/director digital strategy, “... our conversion with Harland Clarke went pretty flawlessly.” Columbia Bank sent a survey to clients asking for feedback on the transition experience. Of the respondents who received dedicated support, 85 percent were satisfied with their transition experience, and 95 percent were satisfied with their Harland Clarke dedicated support specialist.

*“The key to achieving client satisfaction was investing in third-party Harland Clarke support and **allowing our clients’ business needs** to lead our decisions.”*

Ann Higgins,
SVP/Director Digital Strategy,
Columbia Bank

Many variables impact 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

Learn more about how ConversionCX™ can help you deliver an optimal customer experience across the digital conversion journey — from awareness and implementation to full adoption and utilization.

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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