

CASE STUDY

## Patelco Credit Union Puts the Focus on Member Service for Mass Card Reissue

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SUSAN CEVALLOS COLEMAN  
VICE PRESIDENT OF INTERNAL AUDIT

### CHALLENGE

Patelco Credit Union, a financial institution with more than 370,000 members in and around northern California, planned a mass reissuance of 160,000 debit and credit cards — all expiring within a six-month period, which put the credit union and the member experience in a vulnerable position. Patelco was committed to making the experience as frictionless as possible for members. Anticipating spikes in call volume and the possibility of extended wait times, Patelco sought an experienced, third-party overflow supplier to provide members the support they needed, when they needed it, and honor the credit union’s “highest level of service” commitment.

### SOLUTION

When the credit union expressed concerns of sending frustrated, high-risk members — those who had exhausted their self-serve options — to a third-party, Harland Clarke invited Patelco to visit its contact center and see the “Harland Clarke Difference” firsthand. The tour of Harland Clarke’s San Antonio facility confirmed the decision. “What resonated with me was how Harland Clarke managers were able to keep employees engaged,” explained Susan Cevallos Coleman, Vice President of Internal Audit.

The Harland Clarke team began by seeking to understand the credit union’s multi-wave model for getting cards into members’ hands, then worked with the credit union to forecast incremental call volume. Throughout the reissue, Harland Clarke remained flexible, scaling staff up and down as needed in timing with card mailings. Highly-skilled, Harland Clarke specialists were

at-the-ready to answer members' questions and help them activate their cards. "Everyone from Harland Clarke was really responsive," remarked Coleman. "We spent hours listening to calls and giving feedback, which I really appreciated."

## RESULTS

Patelco experienced an impressive 80 percent activation rate.

"Harland Clarke specialists connected with our members and made them feel like someone was trying to help them," shared Coleman. "As Patelco Credit Union moves into the future ... we can really benefit from a partner like Harland Clarke. Their services allow us to provide our members with a personal experience at high-impact moments."

*Many variables impact marketing campaign success. Information on earnings or 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.*

Learn how Harland Clarke can provide your financial institution best-in-class contact center support you need, when you need it.

## 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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