

CASE STUDY

ConversionCX™ Provides Kern Schools FCU Members “Best Service Possible”

2½ week
conversion period

92.82% answer rate

13,000+
calls answered

60,000
members serviced

BACKGROUND

Kern Schools Federal Credit Union is the largest member-owned financial institution headquartered in Kern County, California. Since its humble beginnings in 1938, Kern Schools has embodied its motto of “People Helping People.”

With more than 150,000 members and \$1.4 billion in assets, Kern Schools FCU is known for their community-based approach to financial solvency.

CHALLENGE

Kern Schools FCU was gearing up for its second online banking conversion and wanted a proactive strategy to ensure stellar member service and a seamless experience for their staff and members.

SOLUTION

To prepare for the pending influx of inbound calls, the credit union knew it had to find a service provider that could expertly assist them logistically and operationally. Once they learned about Harland Clarke ConversionCX, Kern Schools FCU worked with Harland Clarke to provide augmented contact center capacity to ensure members received the highest level of care throughout the conversion.

“My impression of Harland Clarke before I started this project with them was check printing. I had a very limited understanding of what Harland Clarke was and what they provide for their clients, and I have learned a lot since then. I found out that what they would provide was a very customized

solution for us. They also had some really great technical solutions to be able to fully assist our members,” said Shonna Shearson, Vice President of Contact Center and Training at Kern Schools FCU.

The Harland Clarke team provided dedicated support to 60,000 members seeking password resets, unlocks or navigational assistance. Harland Clarke also supplied customized planning assistance and setup support leading up to the conversion. To address and correct issues arising each day, hourly reports were provided and internal messaging was used to communicate with the credit union’s team so they could escalate and respond quickly as needed.

Finally, Harland Clarke provided onsite support to ensure a smooth transition.

RESULTS

The credit union was extremely pleased with the experience of teaming up with Harland Clarke. In just over 24 hours, Kern Schools FCU had an adoption rate of over 26 percent. In 48 hours, the adoption rate was almost 38 percent, and, by day-seven post-conversion, the adoption rate was approximately 66 percent. With stats like these, it was undeniable how well the program performed.

Despite a nearly 200 percent increase in call volume, the credit union’s contact center, with support from Harland Clarke, was able to deliver on their service level goals and achieved greater than a 92 percent answer rate during the conversion period.

“When I think of Harland Clarke, I think trusted partner. I think solutions and I think somebody who can treat our members just like we would treat them,” Shearson said.

Many variables impact campaign success. The 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 ConversionCX can help your financial institution deliver a seamless experience to customers during a digital banking conversion or change event.

THE HARLAND CLARKE DIFFERENCE

At Harland Clarke, a single strategy drives everything we do. We help you better engage with your customers to keep you first in their minds. It is as true today as it has been for over 145 years.

Count on us for strategic, high-performance solutions designed to deliver superior customer experiences. We put our expertise, business insight, and best practices to work for you, driving bottom-line results every time.

With Harland Clarke as your partner, you have a single, trusted resource dedicated to executing on your business strategy and supporting your long-term success.

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