

CASE STUDY

Unitus Community CU
“surprised” and “delighted”
by smooth digital conversion

82% conversion rate

<0.5% call escalation

98% answer rate

89% service level

BACKGROUND

Unitus Community Credit Union, a financial institution with more than 80 years of serving communities in the Pacific Northwest, planned to convert 63,000 members to a new online banking platform. Unitus sought a third-party supplier to make sure the credit union could properly support members throughout the conversion process and honor “the Unitus difference” of unparalleled service.

SOLUTION

Unitus turned to Harland Clarke because of its ability to provide the level of support the credit union needed, for exactly as long as Unitus needed it. “No other contact center supplier offered short-term, scalable capacity along with all the other services that were important to us,” shared Char Sears, AVP, Remote Experience Manager.

The credit union’s tour of Harland Clarke’s contact center facility confirmed the decision. “The most powerful piece was coming out to San Antonio and seeing the agents in action. Their level of care, concern and engagement sealed the deal,” said Sears.

During a change event such as an online or mobile banking conversion, call volume and average handle time can double, or even triple. Unitus realized it needed to staff up to meet the increase in member contacts or risk long wait times and less-than-expected service.

Harland Clarke helped Unitus forecast incremental call volume and the augmented resources needed to provide a seamless experience to members during the event. "Harland Clarke really had all the details well thought out, so we knew what to expect each step of the way, and that was reassuring to us," said Sears.

After the conversion went live, Harland Clarke maintained close daily communication with the credit union to ensure quick response to feedback and provide timely updates to all parties on key metrics. Remarkd Sears, "It felt like Harland Clarke representatives were Unitus teammates. When there's so much at stake, you want a partner that's going to represent you the way you represent yourself."

RESULTS

Harland Clarke handled 15,660 calls for Unitus and converted 82 percent of registered users onto the new platform in six weeks with outstanding results:

- <0.5% call escalation
- 98% answer rate
- 89% service level

There was another informal but very important metric that spoke volumes for Unitus. "Not one member indicated they knew they were talking to someone other than a Unitus representative," said Sears. "From a service perspective, that surprised and delighted us because the member experience is number one."

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.

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