

CASE STUDY

# Credit Union Achieves Record-High Net Promoter Score During 42,000-Member Digital Banking Conversion

## About San Mateo Credit Union

Committed to helping members achieve financial health

Home to more than 90,000 members

*“Not for profit, not for charity, but for service”*

*“People helping people”*

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Over Four Weeks,  
Harland Clarke  
Conversion Specialists:

Handled **8,631** calls

Answered questions in  
**1:13 minutes**  
(average)

Achieved a **65%**  
adoption rate

## BACKGROUND

San Mateo Credit Union (SMCU) planned to convert 42,000 online banking users to their latest digital banking platform. The credit union needed a third-party partner that understood the importance of reporting, call recording, scripting, training, and with a track record for delivering the highest level of service.

## SOLUTION

SMCU chose Harland Clarke to provide augmented contact center capacity to ensure its members received the highest level of dedicated care throughout the digital banking conversion.

*“It was important to be able to trust our partner to guide members through the conversion,”* said Doreen Szymanski, Vice President of Member Experience at San Mateo Credit Union. *“Harland Clarke’s culture aligns with ours, and they became an extended family to us.”*

To maintain optimal staffing levels, Harland Clarke delivered regular productivity reports on call metrics, service quality, and performance achievements. Throughout the conversion, Harland Clarke remained flexible — adjusting staffing and hours, as needed — to support the true call volume the credit union was anticipating.

*“Having timely data at my fingertips was huge in helping me make the right decisions on scaling and hours,” Szymanski explained.*

*“The Harland Clarke team listened to our needs and made it happen.”*

With the credit union’s agents working remotely due to COVID-19, timely collaboration was crucial. Harland Clarke implemented a daily group chat during support hours to allow for the real-time escalation of questions and issues to San Mateo Credit Union’s leadership, which further enhanced the level of service provided to members.

*“Things move very fast in a conversion environment. It was important for us to have a partner like Harland Clarke,” said Szymanski. “When we called and asked for our service level, they delivered right on the spot. Daily communications and group chats were key to our success.”*

## RESULTS

The seamless handling of such a large-scale conversion is what surprised San Mateo Credit Union most. Over four weeks, Harland Clarke conversion specialists assisted by handling more than 8,500 calls, providing answers to members’ questions in an average of less than a minute and a half, and helping the credit union to achieve a member adoption rate of 65 percent — while contributing to a record-high Net Promoter Score.

*“We hit our highest Net Promoter Score ever (67) during a conversion month,” Szymanski said.*

*Many variables impact marketing campaign success. Information is provided for demonstrative purposes only. Harland Clarke does not guarantee or warrant a particular level of success with a campaign.*

Learn how Harland Clarke provides financial institutions with best-in-class contact center support during digital banking conversions.

## 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.

Call **1.800.351.3843**

Email **contactHC@harlandclarke.com**

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