

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 bank sought to ensure a smooth transition for its 25,000 commercial banking, treasury management and small business clients during an upcoming digital conversion.

### SOLUTION

Aware of how changes to the digital experience can cause disruption and customer frustration, Columbia Bank enlisted the help of Harland Clarke.

ConversionCX<sup>TM</sup> from Harland Clarke provides skilled resources, proven best practices and expert contact center support to ensure a smooth digital transition experience for financial institutions and their clients and customers. ConversionCX helps turn potentially disruptive events into opportunities to boost satisfaction, increase retention and maximize conversion value.

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, high-value 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 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.

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*“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

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*Many variables impact success. The information in this case study is provided for demonstrative purposes only. Harland Clarke does not guarantee a particular level of success.*

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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