SEALING The M&A Deal

Four Ways to:











of banks with assets of \$10 billion or more plan to actively acquire within the next five years¹

Especially in 2021

to reduce stress and disruption.

Effective M&As result in carefully managing consumer uncertainty. Communicate on the customer's terms. Set of acquired bank customers said

a clear timeline and manage expectations

Bankers and deal advisors predict a for M&As²

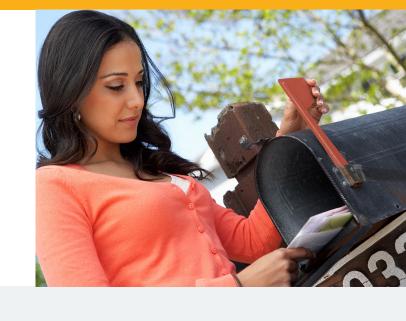
they likely would not remain a

customer after an M&A³

A positive customer experience — before, during, and after an M&A — is the true measure of success.

The First Way Personalize your customer communications

Meet customer expectations for personalized communications by engaging them one-to-one.



72% of consumers only engage with personalized messaging⁴

Go all-in on personalization. A big pitfall for M&As is putting too much

Here's The Deal

focus on the mechanics, and not enough on the customer experience.

Provide white-glove service to business-critical customers Allocating dedicated support to top-echelon

The Second Way

customers promises more business referrals,

improved buying propensity and brand loyalty. Proactive communications delivered at the right time,



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support to ensure they are ready for the transition and understand the benefits.

Assign dedicated representatives to reach out to your best customers with white-glove

experience customers expect Earn customer trust and build loyalty with consistent, coordinated

Deliver the consistent brand

The Third Way

multichannel messaging. 75% of consumers prefer a consistent experience⁶ Customers trust banks that deliver consistent customer journeys 30% more than those that don't7

Coordinated, consistent communications inspire confidence and make customers more comfortable remaining with the financial institution post-merger.

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Deliver excellent and accessible customer service Ensure you have the call center

The Fourth Way

capacity to effectively manage unexpected problems.

when they want answers to urgent

Call volumes can spike 300% during digital conversions8

81% of customers prefer live interaction

and complex issues⁹

Humans want to talk to humans. A high-performance contact

touchpoint that is crucial to any successful M&A.

center provides the human

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Accurate forecasting and proper staffing are key to avoiding long wait times and frustrated customers. Call center activities are especially important, as this may be the first interaction customers have with the acquiring financial institution.

Find out why an integrated, unified and proactive

communications strategy — that puts the customer first — is the blueprint for a successful M&A.

Call 1.800.351.3843 Email contactHC@harlandclarke.com

Visit harlandclarke.com/ConversionCX

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⁹ Conkle, Brennie, "The Future of Digital Banking is About Great Conversations," August 1, 2017, The Financial Brand

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