

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”

OVER FOUR WEEKS, VERICAST CONVERSION SPECIALISTS:

Handled **8631** 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 Vericast 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, Vericast delivered regular productivity reports on call metrics, service quality, and performance achievements. Throughout the conversion, Vericast 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. Vericast 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.”**

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

RESULTS

The seamless handling of such a large-scale conversion is what surprised San Mateo Credit Union most. Over four weeks, 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.

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

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

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