

# Turn high-impact conversions into high-value customer experiences



## Digital platform conversions are often necessary, but never easy.

For financial institutions, digital platform conversions have far-reaching impact, fraught with unforeseen problems that will deeply affect their customers — consumers, small business, and commercial clients — as well as their employees and brand for years to come.

The measure of a truly successful conversion is about more than the conversion itself. Successful conversions are strategically planned, expertly guided events designed to deliver an optimal customer transition experience. Every customer interaction that occurs before, during and after a conversion is a moment of opportunity to deepen the relationship and make a lasting impression.

### *Value of Conversion Journey Optimization*

*Business customer satisfaction ratings greater than 76%<sup>1</sup>*

*68% of customers are likely to stay with their primary bank<sup>2</sup>*

## Harland Clarke Delivers Leading, Expert-Level Guidance for Digital Platform Conversions

Harland Clarke ConversionCX offers a world-class infrastructure of dedicated, specialized resources — people and processes, expert guidance, and industry-leading best practices to deliver quality customer experiences before, during, and after your conversion. No other solution can match our depth of conversion expertise or the scope of our offering.

## Investing in the Customer Experience Promises a High Return on the Customer Relationship

Harland Clarke ConversionCX helps increase retention, drives more business referrals, improves buying propensity and strengthens your brand by proactively engaging and supporting your customers through the conversion journey — from awareness and implementation to full adoption and utilization. We come to the table with a roadmap for your success.

<sup>1</sup>. Bank Customer Survey Responses

<sup>2</sup>. "2016 Retail Banking Voice of the Customer Survey," Capgemini Global Financial Services, 2016

## Why Harland Clarke ConversionCX™



### Step 1: Pre-implementation

- Understand the unique needs of each customer segment to ensure an optimal transition experience
- High-skilled conversion specialists proactively engage high-value customers to ensure full adoption, utilization and satisfaction
- Provide comprehensive messaging and training content
- Work with you to provide a level of engagement to meet your customer tiers, needs, and budget

### Step 2: Conversion

- Proactively engage customers to ensure full adoption, utilization and satisfaction
- Execute customized communications to each customer tier — right message, right time, right channel
- Serve as an extension of your brand, providing step-by-step support, coaching, and issue resolution
- Provide highly-skilled inbound phone support

### Step 3: Post-implementation

- Survey customers to ensure satisfaction and full utilization
- Provide customer experience analytics, reporting, and optimization

Harland Clarke does the heavy lifting, so you have peace of mind that all aspects of your conversion plan are working together seamlessly for unparalleled responsiveness, productivity, and efficiency. Our end-to-end solutions are fully integrated, but can also be retained on a point-solution basis.

### Experience the Harland Clarke Advantage

With more than a century of experience serving the financial services industry, Harland Clarke is uniquely qualified to understand your business, your customers, and the challenges you face. We put our experience to work for you by delivering best-in-class customer engagement that supports your strategic business growth and sustained long-term success.



Find out more about how Harland Clarke ConversionCX can help your financial institution deliver a best-in-class customer transition experience.

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