

CASE STUDY

Proactive Call Center Support Results In **Successful Digital Banking** Conversion and Satisfied Members



BACKGROUND

Valley Strong Credit Union is the largest member-owned financial institution serving the San Joaquin Valley in California. Since its humble beginnings in 1938, Valley Strong has embodied the credit union motto of **“People Helping People.”**

With more than 263,000 members and \$3.6 billion in assets, Valley Strong Credit Union is known for their community-based approach to financial solvency.

2½ week
conversion period

92.82%
answer rate

13,000+
calls answered

60,000
members serviced

CHALLENGE

Valley Strong Credit Union was gearing up for its second online banking conversion and wanted a proactive strategy to ensure stellar member service and a seamless experience for their staff and members.

SOLUTION

To prepare for the pending influx of inbound calls, the credit union knew it had to find a service provider that could expertly assist them logistically and operationally. Once they learned about the Customer Change Management solution from Vericast, Valley Strong worked with Vericast to provide augmented contact center capacity to ensure members received the highest level of care throughout the conversion.

The Vericast team provided dedicated support to members seeking password resets, unlocks or navigational assistance. Vericast also supplied customized planning assistance and setup support leading up to the conversion. To address and

correct issues arising each day, hourly reports were provided and internal messaging was used to communicate with the credit union's team so they could escalate and respond quickly as needed.

Finally, Vericast provided onsite support to ensure a smooth transition.

RESULTS

The credit union was extremely pleased with the experience of teaming up with Vericast. In just over 24 hours, Valley Strong Credit Union had an adoption rate of over 26 percent. In 48 hours, the adoption rate was almost 38 percent, and, by day-seven post-conversion, the adoption rate was approximately 66 percent. With stats like these, it was undeniable how well the program performed.

Despite a nearly 200 percent increase in call volume, the credit union's contact center, with support from Vericast, was able to deliver on their service level goals and achieved greater than a 92 percent answer rate during the conversion period.

“When I think of Vericast, I think trusted partner. I think solutions and I think somebody who can treat our members just like we would treat them,” said Shonna Shearson, Vice President of Contact Center and Training at Valley Strong

Many variables impact success. Information in this case study is for demonstrative purposes only. Vericast does not guarantee a particular level of success.

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Learn how Vericast can help your financial institution deliver a seamless customer experience during a digital banking conversion or change event.

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