

Improving Customer Experience in Banking Transitions

Are you changing your digital banking platform? As you focus on getting the technology right, remember to keep the employee training and customer experience in banking at the forefront. If your employees are not prepared and adequately trained to use your system, you could end up with frustrated customers, low adoption or even attrition.

A digital banking conversion can be a [high-impact change event](#) similar to a mass card reissue or core conversion. Putting the customer experience at the center of the conversion journey will drive adoption, utilization and optimization. A proactive approach ensures customers know what to expect, feel good about the change and are fully prepared to take advantage of the new platform. This goal improves the customer experience and your bottom line.

These are some best practices to ensure an optimal migration experience:

How to Improve Digital Banking Customer Experience During Conversion

Transitioning to a new digital banking platform is a significant undertaking for any institution, and it's one that directly impacts your customers. It's an opportunity to strengthen trust and loyalty, but without careful attention to the digital banking customer experience, it can also lead to confusion and dissatisfaction. According to the Consumer Bankers Association's [2025 CX20 Report](#), there's a clear disconnect between perception and reality: while 80% of business leaders believe they're delivering great customer experience, or CX, only 24% of customers agree.

Customer experience in banking isn't just a task to complete — it's a guiding principle that should influence every decision during a digital banking conversion. When CX is treated as an afterthought or confined to a single department, institutions risk falling short of customer expectations. However, by embedding customer experience into every phase of the transition, financial institutions can drive higher adoption rates, improve satisfaction and foster long-term loyalty.

To enhance the customer experience during a conversion, proactive communication is key. Keeping customers informed with clear timelines, regular updates, and personalized support can make all the difference. When customers feel prepared and supported, they're more likely to embrace the new platform, ensuring a smoother transition for everyone involved.

Build a Plan That Puts Customer Experience First

Your conversion migration plan should prioritize an exceptional digital banking customer experience. This plan serves as a roadmap of critical tasks, milestones and due dates for each phase and wave of the digital migration, along with deliverables, dependencies and resource needs. Having a clear conversion plan helps your team remain organized and best position your financial institution to achieve its service level objectives.

Remember that project plans are intended to be aspirational, not fixed in stone. So, treat your plan as a living and evolving document to guide cross-functional teams and capture executive decisions that alter the project scope.

Keep Internal Teams Aligned Around the Customer

Ensure your frontline team understands the benefits of the migration to your digital platform. This will allow your customer-facing contact center support agents, line-of-business employees and treasury management officers to explain the perks of online conversion to your customers.

A seamless customer experience in banking depends on internal alignment. Regular updates, clear communication, and a shared understanding of the migration's goals will empower your team to deliver exceptional service during this high-impact change event.

Ensure Leadership Visibility From Start to Finish

Executive buy-in must be one of your first priorities when planning a digital conversion. Bring in senior leadership early and communicate with them often. This will help alleviate their concerns and ensure the project progresses smoothly from inception to completion.

A strong customer experience in banking starts at the top. When leadership prioritizes customer-centric strategies, it sets the tone for the entire organization. By maintaining visibility and accountability throughout the process, executives can ensure that customer needs remain at the forefront of every decision, driving both satisfaction and long-term loyalty.

Communicate Early to Strengthen Digital Banking Experience

Don't wait until the digital platform is ready for launch before reaching out to your customers. A strong digital banking customer experience starts with proactive communication. Significant changes can take time for customers to adjust to, even when the outcome is positive. As [Forbes](#) highlights, early and transparent communication during transformations helps set expectations, build confidence, and minimize disruption.

By engaging early, you can ensure customers feel supported throughout the transition. Reach out to your customers pre-conversion to drive full adoption, utilization, and optimization of the platform. Proactive and pragmatic outbound communications, combined with inbound support and training, are essential to protecting and retaining your customer relationships.

Support Adoption With Scalable Training Options

Education and training are essential to exposing failure points and improving the customer experience. Offering one-to-one, high-touch training for high-value customers, alongside group webinars and self-service options, helps to ensure that every customer feels supported.

Proactive training doesn't just reduce call volume and handle times—it also alleviates stress for frontline teams. As [The Financial Brand](#) explains, well-structured training programs during change events equip employees with the confidence and skills needed to deliver seamless customer interactions. The ultimate payoff? A stronger, more positive customer experience that drives long-term loyalty.

Prepare Support Teams for Post-Conversion Demand

While proactive engagement, outreach, and training will reduce call volume and handle times, you can still expect your high-value customers to have questions. Inbound contact center support is vital to the success of your conversion.

According to the 2025 State of Contact Center Report, [61% of consumers](#) prefer resolving issues through human channels — like phone, in-person, or live chat — over digital self-service options. While convenience and short wait times are important, customers also value having their issues resolved on the first try.

To meet these expectations, scale up your contact center with skilled inbound-overflow support so customers get the answers they need when they need them. Augmenting staff, either on your own or through an experienced third-party provider, provides an essential security net to assist quickly and efficiently.

Use Feedback to Fine-Tune the Experience

It can take time for customers to familiarize themselves and become proficient with your new digital platform. The digital conversion journey must include this learning curve.

Engage your customers post-conversion by sending them surveys to assess satisfaction and determine if the new platform is being fully utilized. A strong customer experience in banking is built on listening to feedback and making improvements that align with customer needs. According to the [ABA Banking Journal](#), customer satisfaction is a key driver of retention, with consistent and secure experiences playing a significant role in building trust. A low satisfaction rating is an equally important measure, as it indicates potential attrition.

Partner With Vericast to Improve the Digital Banking Customer Experience

Outsourcing your contact center allows your institution to onboard additional capacity and best practices and to integrate proven processes and expertise to streamline workflows, address call volume uncertainties and optimize scheduling.

You can also save through outsourcing as it eliminates in-house setup, training, project management, production support costs and more. Other benefits of outsourcing include ease and speed of setup, enhanced quality and customer experience, improved consistency and reliability. It's also an opportunity for internal teams to learn and benefit from performance data and process and training lessons learned.

Transform the high risk of [digital conversions](#) into high returns with Vericast. We provide skilled resources, proven best practices and expert contact center support to ensure a smooth transition experience for your financial institution and its customers.

Learn more about how to turn your [contact center](#) into a customer satisfaction center.