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Conversion Services from Deluxe

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Barbara A. Millward
Vice President
MidWestOne Bank
Iowa City, Iowa

Joining Forces: Simplifying the Transition

At MidWestOne Bank, the mission is simple: to take care of their customers. So when the organization completed a merger between MidWestOne Bank, First State Bank, and Iowa State Bank & Trust Co. in August of 2008, they knew that taking care of their combined customer base was the number one goal.

There were many duplicate accounts between the three banks, and many customers that needed to be contacted about getting new checks and supplies to ensure a smooth account conversion. MidWestOne Bank turned to Deluxe to assist the bank with a multi-touch campaign that included mailings and outbound calls to personal and business customers during the transition.

"We wanted our customers taken care of promptly and professionally," says Barbara Millward, Vice President, MidWestOne Bank. "We had certain timeframes we wanted to meet, we needed checks mailed, and we knew we didn't have the resources to contact all customers within that timeframe with everything else we had going on."

"Deluxe really came through for us," says Barbara. "Throughout the merger, we wanted our customers to know that they were top priority with us, and we wanted to keep them informed of our progress. We also wanted them to know that community involvement was a high priority for us, and that the touch from this project was from us. Deluxe delivered all that and more."

The Process: A Multi-Touch Campaign

The bank funded the replacement of new specialty checks for their personal customers, and up to \$200 for business customers to order checks, deposit tickets, endorsement stamps and covers. For those customers handled by Deluxe, an initial mailing was sent welcoming them to the new bank, providing information about the transition and letting them know that Deluxe would be calling on the bank's behalf to help them through the conversion process.

Through the DeluxeCalling® program, a dedicated team of Deluxe call center professionals followed up with each customer personally for a high-touch calling experience. "We received customer feedback that they were very happy with the professionalism and promptness," says Barbara. "We heard very good comments about the fact that these people knew what they were doing, told customers their options, knew what could be done, got things mailed out to them, and – perhaps most importantly – helped answer any questions."



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Experience, Communication & Flexibility: Keys to a Successful Conversion

“Throughout the whole process, Deluxe was very flexible, very accommodating, and a tremendous resource with suggestions on how to use this process,” says Barbara. Deluxe was able to bring its extensive conversion experience to work for the bank, while customizing the process to help the bank meet its goals and achieve the desired results: satisfied customers who would have a smooth experience getting the supplies they needed to conduct their transactions with the new MidWestOne Bank...and come away with a feeling of enhanced loyalty and satisfaction with the organization.

“Overall, I was just very impressed,” she says. “We had a lot of demands that we wanted to incorporate into the process, and never did I hear, “We can’t do this.” Barbara says her team appreciated that they were listened to, and that Deluxe tried to meet the bank’s goals for what it wanted to accomplish with the program. “They advised us on best practices based on their experience, but we weren’t locked into some completely pre-packaged program that was inflexible for us. That was important to us.”

MidWestOne Bank recognized that Deluxe is focused on delivering a quality product and understanding each financial institution’s goals for the transition process. “Their guidance, flexibility and communication are all perks you get when dealing with Deluxe,” says Barbara. “I think all are key to a successful campaign.”

The Results: Delivering a Quality Experience

With Deluxe’s help, MidWestOne Bank was able to achieve a 69% response rate from business account holders who ordered checks with their new account information and was also pleased with the excellent level of response from its personal account holders. “We had very few customers who did not respond to calls from Deluxe,” says Barbara. “With all the duplicate accounts that we had originally, we were very pleased that the new checks were in our customers’ hands when the merger was final.”

“Looking back on it, I don’t know how we could have moved through this process without help from Deluxe,” she says. “We simply could not have contacted all the customers and gotten this done without their assistance. Their professionalism on the front end and back end certainly made it a pleasure to work with them.”

If you have questions or would like more information on Fast Forward Conversion Services, please contact your Account Representative or call 888-633-5893.



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