Case Study

BMO

Learn how Technical Assistance Center delivered 98.4% CSAT for the Bank of Montreal

BMO

Background

The Bank of Montreal (BMO) embarked on a critical project following its acquisition of Bank of the West. The objective was to smoothly transition Bank of the West's clients to BMO's remote deposit capture (RDC) system. This involved replacing incompatible scanners, scheduling installations, and ensuring that users were adequately trained on the new scanner and new system. The project commenced in May 2023 and concluded successfully by the end of October 2023.

> "Technical Assistance Center (TAC) solves puzzles. One of the biggest learnings on this particular project was the importance of accurate data. The more accurate the data we have, the better it works for us and the client."
>
> **Gordon Musgrove**,
> Director of Client
> Delivery, Superior

The Challenge

The project presented several challenges across its 6 month duration:

- **Compatibility Issues:** Many of Bank of the West's scanners were incompatible with BMO's RDC system.

- **Data Gaps:** Incomplete data on scanner inventory, administrative rights, and user details posed obstacles to the transition.

- **Coordination Complexity:** Ensuring scanners were delivered, received, and installed before scheduling appointments required methodical coordination.

- **Client Variation:** The clients ranged from single users to businesses with hundreds of scanners across multiple locations, necessitating tailored solutions.

- **Staffing Dynamics:** Managing a Technical Assistance team that started with 23 members and gradually scaled down to two by the project's conclusion required effective communication and adaptability.

98.4%
CUSTOMER SATISFACTION

+4K
MIGRATED USERS

BMO

The Solution

The TAC team implemented a structured and agile approach to address these challenges:

1. **Scanner Replacement:** 10% of scanners required replacement before the transition. A daily update process identified clients with incompatible scanners. New scanners were shipped promptly, upon delivery confirmation installation appointments were scheduled.

2. **Streamlined Communication:** The TAC team used daily huddles, chat systems, and team meetings to ensure alignment. This system allowed agents to resolve issues collaboratively and quickly.

3. **Personalized Support:** A combination of email, phone calls, and Zoom sessions was used to guide clients through scanner installation and system transition. The ability to share screens via Zoom enabled effective troubleshooting. Over 11,000 outbound calls were placed, 6,700 inbound calls were answered, 31,000 emails were delivered and 5,000 Zoom conferences were held throughout the 6 month project.

4. **Detailed Training:** Scripts, templates, and role-playing exercises ensured agents were prepared to handle diverse client scenarios. Training was continuously adapted based on real-time feedback.

5. **Efficient Scheduling:** Using Superior's proprietary online scheduling platform, clients were able to schedule appointments based on their schedule needs. Agents handled seven hour-long scanner installation appointments per day, with shorter sessions for URL updates. The team maintained flexibility to address client-specific needs.

The Results

The project was a resounding success and achieved impressive outcomes:

- **Client Migration:** Out of 6,508 initially listed active and inactive users 1,315 users were identified to descope, and 4,219 users successfully transitioned to the new RDC system. Resulting in a program completion rate of 85%.

- **High Client Satisfaction:** The project received a 98.4% Customer Satisfaction (CSAT) score, with clients frequently praising the team's patience, professionalism, and expertise.

- **Operational Success:** The seamless transition maintained continuity for clients and demonstrated BMO's commitment to customer service.

The project's success has laid the groundwork for future initiatives.

Want more information?

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The Superior Difference: Technical Assistance Center

As specialists in delivering excellent customer service, we understand the importance of a positive customer experience during RDC conversions, core platform migrations, ACH and wire platform upgrades, and other system platform changes. With a long history of excellence in treasury management, banking practices, and customer experience, Technical Assistance Center is here to help you achieve your goals.

Our Technical Assistance Center can proactively deliver your client's support for treasury and cash management programs and hardware including:

- Software upgrades

- Platform migrations

- Digital conversions

- RDC conversions & upgrades

- ACH and wire platform upgrades

- New service onboarding

- Mergers & Acquisitions

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