

Case Study

First Merchants Bank



A Smooth Migration: Learn How TAC Delivered a Successful Transition for First Merchants Bank



Background

First Merchants Bank (FMB) needed to upgrade its online banking services to meet evolving customer expectations. Partnering with Superior's Technical Assistance Center (TAC), FMB successfully transitioned from a legacy platform to a modern, user-friendly system.

Over eight weeks, TAC meticulously executed the migration in three structured waves, surpassing previous benchmarks with a 61% interaction rate and delivering exceptional customer satisfaction.

61%
INTERACTION
RATE

"Two of the executive members from First Merchants Bank were eager to participate in conferences where they spoke highly of TAC's work. It was great to see them recognize how wonderful our TAC team is during those events."

Joe Hammond,
TAC Project Manager,
Superior

The Challenge

FMB's legacy platform could no longer meet the expectations of modern banking customers. Outdated technology, limited functionality, and security vulnerabilities made migration imperative. However, the project posed several challenges:

- **Complex data migration:** Ensuring all customer data transitioned seamlessly and accurately.
- **Customer change management:** Educating users on the new platform and addressing their hesitance to adapt.
- **Cross-team coordination:** Facilitating efficient collaboration between TAC and FMB's internal teams to ensure project success.

+9K
EMAILS
PER CLIENT

“Customer satisfaction was our main priority. We ensured clients had the resources they needed for a smooth transition, whether through personalized Zoom sessions, user guides, or training videos. Seeing that sense of ease and confidence in our clients during the migration process was incredibly rewarding.”

Brandon Brugman,
TAC Team Manager,
Superior

The Solution

A Wave-Based Rollout and a Comprehensive Support Strategy

TAC developed and executed a phased migration strategy to ensure a seamless transition:

- **Wave 6:** Focused on Positive Pay and ACH payments.
- **Wave 7:** Addressed ACH, wire transfers, and BillPay.
- **Wave 8:** Targeted administrative tools and broader platform enhancements.

TAC provided personalized communication and tailored resources to engage clients and provide them with the tools. Key elements of the outreach program included the following.

1. Personalized Communication:

- **Emails:** Over 9 emails per client ensured consistent engagement.
- **Outbound Phone Campaigns:** To connect with clients who may be less responsive to email.
- **Zoom Appointments:** Tier 1 clients received personalized support sessions with screen-sharing capabilities for real-time assistance.
- **Webinars:** Live webinars delivered interactive training sessions for broader client groups.

2. White-Labeled Services:

- TAC operated under FMB's branding, creating a seamless and trustworthy experience for customers.

3. Customer Resources:

- Custom training videos created by TAC offered clear, on-demand guidance, reducing reliance on live support.
- Dedicated landing pages hosted user guides, training materials, and video tutorials.

4. Proactive Reporting

- Daily and weekly reports tracked progress, allowing the team to adjust strategies based on client engagement and feedback.

The Results

The phased migration delivered outstanding outcomes:

- **61% Interaction Rate:** Exceeding the projected 55% average for comparable TAC conversion projects.
- **Enhanced Engagement:** Webinar participation rose dramatically, from 84 attendees in Wave 6 to 1,372 in Wave 8.
- **High Customer Satisfaction:** Personalized support and clear communication built trust, ensuring a smooth and successful migration experience.

By providing personalized support and proactive communication, TAC not only ensured a smooth migration but also reinforced FMB's confidence in their partnership. This foundation of trust and exceptional service has solidified Superior's reputation as a reliable and valued partner for FMB's ongoing success and future initiatives.

Want more
information?

Contact us today.

superiorpress.com

Call 562.368.1700

The Superior Difference: Technical Assistance Center

As specialists in delivering excellent customer service, we understand the importance of a positive customer experience during core conversions, RDC conversions, 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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