

Case Study

Seacoast Bank



Discover how Technical Assistance Center Delivered A Superior Customer Experience during Seacoast Bank's Client Migration and RDC Upgrade



Background

Having recently acquired ProBank, SeaCoast needed to transfer 300 ProBank clients to its platform before undertaking a Remote Deposit Capture (RDC) upgrade for 1330 banking clients.

The project was divided into two phases and Superior's Technical Assistance Center won the contract to help with the transition.

98.3%
TRANSITIONS
ON TIME

"Delivering exceptional service for our clients is at the heart of everything we do at Technical Assistance Center. Each successful project, no matter what the challenges, reinforces our commitment to excellence and to building lasting client relationships."

Gordon Musgrove,
Director of Client
Delivery, Superior

Phase 1: Ensuring a First Class Experience for the ProBank Client Migration

The Challenge

The TAC team was tasked with migrating 300 ProBank clients within a one-month timeframe during June 2023. Each client received VIP treatment with hour-long appointments for a personalized, white-glove experience. The early stages of the project saw some initial login issues with the Seacoast system which threatened a possible delay to the migration process.

The Solution

Quickly resolving these technical glitches was crucial for the successful migration, with 295 out of 300 clients transitioning on time. The TAC team's dedication to promptly resolving issues and providing best in class service ensured customers had a seamless transition to the Seacoast platform.

"I am immensely pleased with the outstanding performance of the TAC team throughout this project. Their expertise and agility were instrumental in navigating tight timelines and overcoming challenges, ultimately delivering exceptional results. Achieving such a high CSAT amidst complexities is testament to the team's dedication to delivering client satisfaction."

April Levin,
VP of TAC Migration
Solutions, Superior

Phase 2: Overcoming Challenges in the RDC Upgrade

The Challenge

The RDC upgrade was planned for 1330 clients across the month of July 2023. As phase 2 began it became clear that the project would be faced with logistical hurdles due to delays in acquiring the bank's data. As a result of this delay, the TAC team had to swiftly adjust their project plan, reducing appointment durations from one hour to 30 minutes in order to meet the strict deadline for completion of this project. The new compressed timeline posed significant challenges for the team, necessitating back-to-back appointments and a tight window for uninstalling and reinstalling the system upgrade.

The Solution

To ensure the very best customer experience given the circumstances, Technical Assistance Center implemented strategic measures. A Spanish-speaking representative was integrated into the TAC team, catering to diverse client needs. An escalation specialist was also appointed to promptly address and resolve emerging issues.

Despite the constraints, the TAC team, comprising four full-time agents, efficiently managed fourteen appointments daily, surpassing the original plan of seven appointments per day. Proactive outreach strategies were used to remind clients of their appointments, with immediate rescheduling assistance provided to those unable to attend within the first 10 minutes. This concerted effort enabled the team to accommodate the increased workload within the shortened time frame, ensuring successful completion of the RDC upgrade.

98.14%

CSAT

"At Superior, we firmly believe that success is a team effort, and nowhere is this more evident than in our TAC team. Throughout this challenging project, every member of the team pulled together, using their unique skills and dedication to deliver exceptional results. It shows our commitment to supporting one another in achieving our goals. I'm so proud of the team."

Jessica Cortez,
TAC Team Lead,
Superior

The Results

Despite the tight timeline and operational challenges, Technical Assistance Center achieved impressive results for Seacoast:

- **Overall CSAT:** 98.14%
- **Phase 1** completed on time despite initial technical teething problems with the Seacoast system. 300 clients successfully transitioned.
- **Phase 2** completed on time despite a significant delay in starting. 1330 clients successfully upgraded.
- **Seacoast was delighted with the project**

Outcome

Despite facing obstacles, the TAC team's agile thinking, problem-solving skills, and commitment to excellence ensured a successful transition for Seacoast's clients.

From addressing technical glitches in Phase 1 to meeting tight timelines in Phase 2, the team demonstrated collaborative communication and strategic thinking throughout the project, resulting in an impressive overall CSAT score of 98.14%. This success highlights TAC's ability to deliver a superior customer experience even under challenging circumstances.



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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