

# Banking Support: Platform Conversion & Efficiency Improvement

## THE CHALLENGE

RDI partnered with a national bank that provides a wide range of banking services to businesses and individual consumers. When faced with the overwhelming task of converting to a new online banking platform, one of the bank's key challenges was keeping up with the anticipated increase in conversion-related call volume. Its internal contact center was not equipped to scale with this expected volume without service levels dropping below standard customer support requirements.

The bank needed a partner to augment internal staffing levels in their contact center, which would allow them to quickly scale up while controlling costs and maintaining quality customer service. That's when the bank came to RDI for help.

## OUR APPROACH

RDI's main goal was to establish a cost-efficient, flexible solution that could easily scale up or down during the conversion while providing consistent customer support related to account inquiries, technical issues, site navigation, log-in assistance, and an overall seamless customer experience.

RDI started with expediting the information security onboarding process. While this task might typically take up to six months, RDI was able to leverage its in-house information security team, comprehensive policies, SOP infrastructure, and PCI Level I and SOC II certifications to achieve InfoSec vendor approval in just three weeks.

RDI utilized award-winning workforce management tools to model call volume forecasts and arrival patterns to determine overall staffing requirements. Arrival patterns did not follow a standard staffing bell curve, resulting in periods of intra-day peak volumes. To support the bank during these fluctuations, RDI implemented a hybrid staffing solution that allocated a core group of dedicated agents, as well as shared resources for overflow support. This was key in allowing RDI to manage real-time volume, keeping agent utilization high and costs low.



Throughout the process, RDI and the bank monitored call queues to ensure the optimal number of agents were available to actively address customer needs. Open communication was established through 24/7 conference bridges, reporting dashboards, and intra-day updates.

## THE RESULTS

The collaboration between RDI and the bank took eight weeks and resulted in the successful support of over 165,000 calls. As the call volume stabilized, RDI worked with the bank to transition calls back to its internal contact center team.

**8 Weeks**  
**165,000 Calls**  
**Customer Satisfaction Success**

## THE CONCLUSION

As a result of this partnership with RDI, the bank successfully navigated its conversion to a new platform while effectively addressing customers' concerns. The results of this case study align with those of other studies that demonstrate the need for flexible scheduling that corresponds with fluctuations in calling patterns. Other studies confirm the importance of having live call agents, not bots, available to address customer concerns.

RDI's proactive approach provided the flexibility and customer care the bank needed—cutting costs without cutting corners.

## ABOUT RDI

RDI is a privately held contact center and IT firm committed to elevating the Customer Experience in its dedicated outsourced environment. Founded in 1978 as a research analytics company, RDI's expertise has grown to include full-service Business Process Outsourcing (BPO) solutions for Contact Center support, Data Analytics, and Managed IT & Helpdesk Services. With 12 domestic and near-shore locations and over 5,000 in-house and work-from-home employees, RDI focuses on the Customer Experience and delivers value-driven results for multiple industries, including leading Fortune 500 client partners.

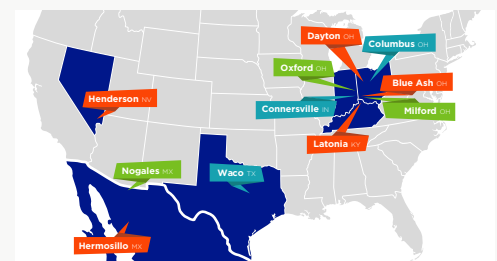
## A FAMILY OF COMPANIES



## BY THE NUMBERS



## OUR LOCATIONS



To learn more about RDI, please visit us at: [www.rdicorp.com](http://www.rdicorp.com)