

Customer Spotlight



The Company

Harland Financial Solutions, a subsidiary of the John H. Harland Company, supplies software and services to thousands of financial institutions of all sizes. Harland Financial Solutions is a leader in deposit & loan origination, platform, teller, call-center, mortgage, business intelligence, core systems, customer relationship management systems, and compliance training software.

Atlanta-based John H. Harland Company (NYSE: JH) is a leading provider of software and printed products to the financial institution market. Harland's software solutions include, deposit & loan origination, platform, teller, call-center, mortgage, business intelligence, core systems, and customer relationship management systems. Harland's printed products offerings include checks, direct marketing and financial forms.

Seeking Support Training

One of Harland Financial Solutions' support centers, located in Pleasanton, CA, has approximately 75 training, implementation, and customer support staff - 35 of those are customer support representatives (CSRs). Additionally, their card services and field engineering groups are situated there, making Pleasanton a hub for Harland Financial Solutions' core system support operations.

In early 2001, Harland Financial Solutions made a corporate decision to increase the service level and value that the support group provides to their customers. After performing a comparative analysis against other available training, Harland Financial Solutions concluded that Service



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Strategies represented the best value for the money with the most applicable course content, and selected three courses:

- **Certified Support Professional (CSP)**

The CSP designation identifies entry-level technical support professionals who are highly skilled in providing excellent customer support. The program teaches soft skills techniques and strategies to effectively work with all types of external customers while solving technical problems over the telephone or via the Internet.

- **Certified Support Specialist (CSS)**

The CSS designation identifies experienced technical support professionals who are highly skilled in problem resolution as well as working with customers and the support team. This senior level support professional typically also functions in a team lead or supervisory role.

- **Certified Support Manager (CSM)**

The CSM designation identifies managers that are well trained and highly skilled in operational decision making and managing the increasing demands of customers. These managers have the necessary skills and abilities to manage in the support environment of highly skilled, technical people, as well as being able to lead, coach and facilitate the activities of these people toward the accomplishments of the involving technical support mission.

Results

"These classes are making a tremendous difference in our support organization," states Michael Barrett, Harland Financial Solutions' senior manager of customer support. "Our support metrics are improving and the Service Strategies courses are playing a significant role in that improvement."

Adds Cheryl Bookhammer, Customer Support Trainer, "turnaround time on support issues has greatly improved, as has the consistent approach to



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Michael Barrett,
Harland Financial Solutions'
senior manager of customer support

addressing our customers' questions and concerns. Our customers have definitely noticed the cultural shift. They know that our Customer Support will provide professional treatment and rapid resolution. Calling Harland Financial Customer Support is a good thing - it means resolution!"

Classes Continue to Play Role in Harland Support Success

Since April 2001, Harland Financial Solutions has sent their entire support staff through one or more of these three Service Strategies' courses. They opt for private classes - where the instructor comes directly to their facility and conducts specialized classes specifically for employees. In fact, Harland Financial Solutions hosted the first-ever private CSM class. To date, they have also hosted three CSP classes and a CSS class, with another scheduled.

The CSP class is now part of Harland Financial Solutions' new hire orientation for customer service representatives. All new agents attend and must successfully pass the course. Additionally, support supervisors and senior level staff take the CSS class while supervisors and managers complete the CSM course.

"For our staff, the base level of understanding and resolution has significantly increased," states Barrett. "Our CSRs have a fuller and broader understanding of the issues and take ownership of the calls. This empowerment means a call is not just a solitary event. They own the call. Our CSRs use good judgment, and are knowledgeable and precise about deciding when to escalate or transfer a call."

"Internally we complete periodic follow-up and reinforcement classes," says Bookhammer. "We take different parts of the CSP class and dissect them - creating one to three hour mini-workshops on various components of the class. We've highlighted dealing with difficult or frustrated callers, what to



do if things go awry, and similar important topics. It's proven to be an invaluable refresher of the Service Strategies materials."

Everyone takes the SSPA certification test at the completion of his or her coursework. "It instills a sense of pride - we do it for our business, naturally, but also because we strongly believe in employee development," says Bookhammer. "These are skills and credentials they will take with them throughout their careers. It shows that they are serious and committed to their profession."

The Future

"We have a strong corporate commitment to customer support," states Barrett. "Service and support is not seen as a cost center or Achilles heel. There is tremendous pride in our support offerings and the corresponding corporate level commitment helps us follow-through." Adds Bookhammer, "a large part of this is the training that we provide for our staff and managers. It pays off. From the top down, it's easy to see the professionalism and positive results we are producing."

Harland Financial Solutions uses the CSP, CSM, and CSS certification achievement as part of their selling cycle to let potential customers know that should service or support issues rise, they can be assured of receiving professional and proficient support from well-trained staff. "We want our potential customers to learn about our support group. We can make the difference!". To learn more about Harland Financial Solutions, visit <http://www.harlandfinancialsolutions.com>.



To learn more about the **Service Strategies** Career Development courses, call 858.674.4864, email info@servicestrategies.com, or visit www.servicestrategies.com

