



REBRANDING AFTER A COMPLEX BANKING MERGER TO REBUILD CUSTOMER CONFIDENCE

Achieving Operational Harmony, Enhanced User Experience, and Unified Brand
Identity Through Strategic Technology Integration

About the Customer

The client is a leading regional bank headquartered in the United States, recognized for its extensive history of delivering trusted financial solutions for over a century. Renowned for personalized customer service, the bank has expanded significantly through strategic acquisitions, enhancing its capability to serve businesses and communities effectively. Its specialized banking divisions provide tailored financial services designed specifically to meet the distinct needs of niche sectors, including community associations and property management firms.

Engagement Story

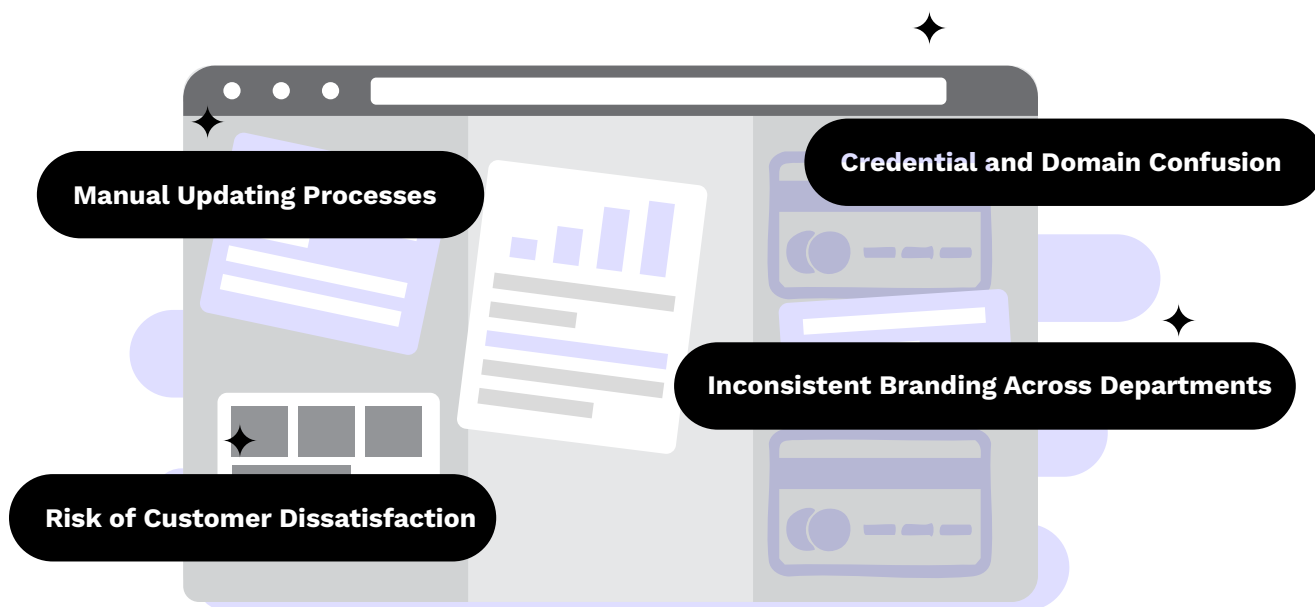
After a significant banking merger, the client faced challenges with branding consistency and clear communication across its key business units. Employees in critical departments such as Equipment Finance, Fraud Prevention, Corporate Complaints, and Accounts Payable were burdened with manually updating branding elements in customer-facing documents and communications. Additionally, employees continued using legacy email credentials from the previous bank, causing confusion and affecting operational efficiency.

Recognizing these critical issues, the client partnered with EvonSys to streamline and execute a comprehensive rebranding initiative. The objectives were clear: seamlessly update and standardize email domains, ensure uniform branding on all correspondence and customer documentation, and implement rigorous quality assurance procedures to guarantee accuracy, clarity, and consistency throughout the transition.

Manual updates and inconsistent branding after a banking merger created confusion and operational inefficiencies.

Key Business Challenges

Following the merger, the client encountered several critical branding and communication issues affecting its key operational departments:



Inconsistent Branding Across Departments

Branding elements in customer communications, including disclosures, disclaimers, and contracts, were outdated and misaligned with the acquiring bank's identity.

Manual Updating Processes

Employees across multiple departments had to manually update logos, terminology, and documentation, leading to inefficiencies, potential errors, and increased workloads.

Credential and Domain Confusion

Users continued to use legacy email credentials from the previously existing bank, creating internal confusion and disrupting smooth communication.

Risk of Customer Dissatisfaction

Inconsistent and outdated communications posed significant risks to customer trust and overall satisfaction, potentially damaging the client's longstanding reputation.

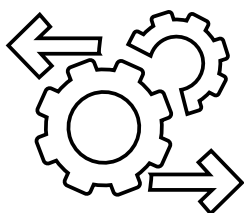
Desired Goals

To effectively address the branding and communication challenges following the merger, the client set forth clear and measurable objectives:



Unified Branding and Communication

Ensure all branding elements, including logos, disclaimers, and terminology, are consistently updated to reflect the acquiring bank's identity.



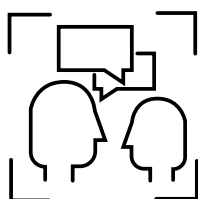
Efficient User Transition

Move all employees seamlessly onto the acquiring bank's standardized email domain and login credentials, reducing confusion and simplifying internal communications.



Reduction of Manual Effort

Eliminate the need for manual updates across communications and documentation, significantly reducing workload and potential errors.



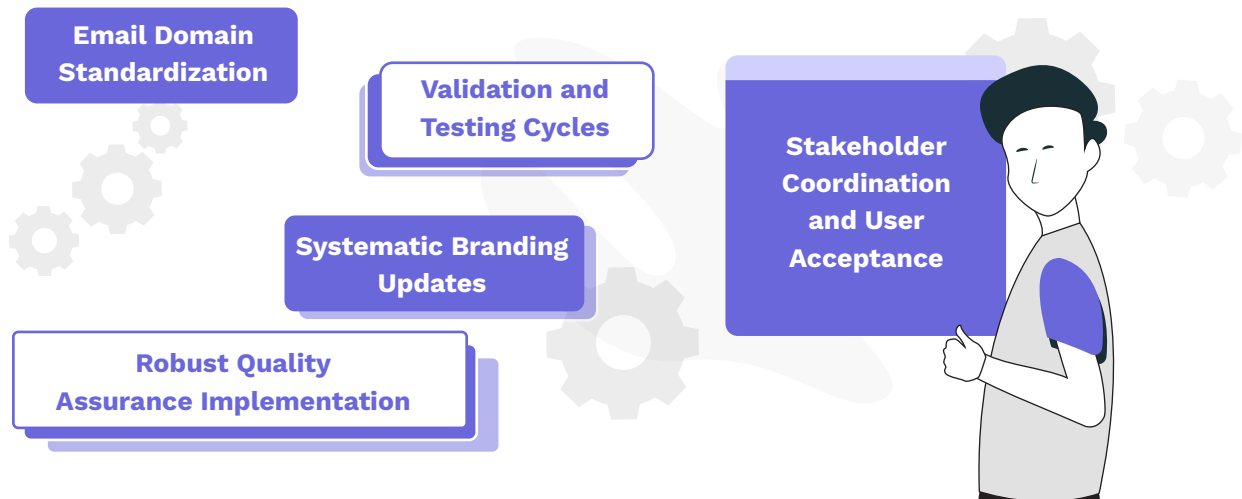
Enhanced Communication Accuracy

Implement thorough quality assurance processes to ensure accuracy, compliance, and consistency across all customer communications during and after the rebranding process.

EvonSys executed a comprehensive rebranding solution, standardizing communication materials and email domains.

Solution

EvonSys delivered a targeted and comprehensive solution to address the client's branding and communication needs after the merger. The solution specifically included:



Email Domain Standardization

Seamlessly transitioned all employee email accounts from legacy domains to a unified domain consistent with the acquiring bank's brand, eliminating credential confusion.

Systematic Branding Updates

Updated logos, terminology, taglines, and disclaimers across all customer communications and documentation, ensuring alignment with the new brand identity.

Robust Quality Assurance Implementation

Introduced meticulous quality assurance practices, including rigorous testing and validation, to maintain accuracy, consistency, and compliance across all branded materials.

Validation and Testing Cycles

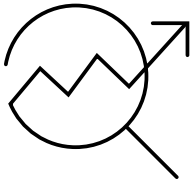
Conducted thorough regression testing and created detailed validation plans, ensuring that the rebranding did not introduce disruptions or inaccuracies.

Stakeholder Coordination and User Acceptance

Worked closely with business stakeholders and technical teams to facilitate smooth implementation and provided comprehensive support during User Acceptance Testing (UAT).

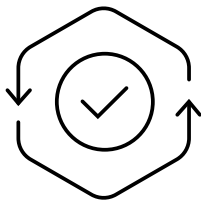
Key Activities Involved

EvonSys carried out several targeted activities to ensure the success of the rebranding initiative:



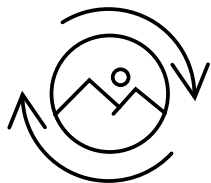
Impact Analysis and Planning

Conducted a thorough analysis to identify all branding elements and documentation areas affected by the merger, clearly outlining necessary updates.



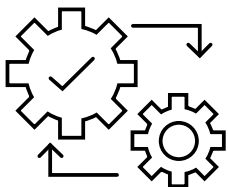
Comprehensive Testing and Validation

Created detailed test cases and executed multiple rounds of regression testing to verify that rebranding changes maintained system integrity and accuracy.



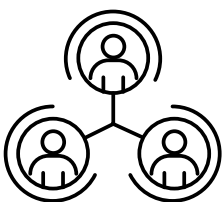
Implementation of Branding Changes

Updated email domains, logos, disclaimers, and all other key branding elements across relevant business units.



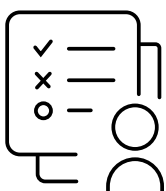
Integration Testing

Validated integration components to confirm proper functionality following rebranding adjustments.



Stakeholder Collaboration

Actively coordinated with business stakeholders and technical teams to resolve dependencies, clarify requirements, and ensure seamless transitions.



Support During User Acceptance Testing (UAT):

Provided demonstrations and direct support to business users throughout UAT, facilitating clear understanding and smooth adoption of the rebranding changes.

Business Outcomes

The rebranding engagement clearly delivered measurable benefits, successfully aligning all business communications with the acquiring bank's identity and significantly enhancing operational clarity:

Unified Brand Representation

Achieved consistent branding across all customer-facing communications and documentation, reinforcing a cohesive and professional brand identity.

Improved Quality Assurance

Established rigorous quality assurance practices, enhancing the accuracy, compliance, and reliability of all branded materials.

Streamlined User Experience

Simplified internal processes by transitioning users onto a unified email domain, significantly reducing credentialing confusion and improving internal efficiency.

Enhanced Operational Clarity

Clearly defined standards and validation procedures set a strong foundation for ongoing accuracy and consistency in future branding and communication efforts.

Engagement Roadmap

The rebranding initiative successfully met its objectives within the planned timeframe. With all branding and communication processes effectively standardized, no further phases are anticipated. EvonSys has established clear operational standards and quality assurance practices, equipping the client to maintain consistency, accuracy, and alignment in future communications independently.

A Pega Upgrade is Too Important to Leave to Chance.

*Before you dive into your next upgrade, take advantage of a **free consultation** with our experts.*

Schedule a Call Now



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