

Successfully Navigating a High-Volume Acquisition Transition

THE SITUATION

A financial services firm acquired another company and needed to onboard the new book of business. As part of the process, account owners would receive a "Welcome Kit" detailing post-conversion changes and actions required. However, in previous acquisitions, the firm had experienced overwhelming call volumes from newly converted account owners, which led to longer wait times and diminished customer satisfaction for existing clients. The firm wanted to minimize this impact while providing excellent service to new account holders.

THE SOLUTION

SS&C Flex stepped in to ensure smooth operations. To identify typical inquiries and predict volumes the Flex team conducted a trend analysis of calls based on past acquisitions. This insight allowed the team to:

- Design a project plan to manage the anticipated spike in calls
- Volume-match staffing to meet project needs
- Hire and train a dedicated team to handle transition-related calls

THE RESULTS

- Handled thousands of incoming calls within the first week
- Exceeded service level expectations throughout the project
- The client has since turned to SS&C Flex multiple times for support when onboarding new acquisitions

SS&C Flex: Unmatched global support for business events

SS&C has 30+ years' experience in helping companies respond to seasonal, disruptive or extraordinary business events, with proven expertise in best practices, processes and systems.

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