

BMO Harris M&I Merger – Deposit Conversion

Challenges:

Two million customers of two legacy institutions needed full conversion information and disclosure – goal to streamline elements for better customer experience

Multiple brands and lines of business required different messaging and branding (one shown here)

Solutions:

Letter with customized account listing and personalized messaging

Unique all-in-one Welcome Guide held three components in a perfect-bound book: introduction to the new company; Change in Terms; handbook of legal disclosures

