



# CLIENT INTELLIGENCE

## MARQUIS CASE STUDY

### Objective:

Better manage relationships with external business partners.

### Analysis:

An application was being used to manage relationships with Select Employee Groups (SEG's); however, it was only accessible to a few employees. The financial institution wanted a solution that was more accessible, more robust and more efficient for managing valuable relationships.

### Action:

Since CallTrax was already being used for managing member relationships, it was the logical solution for managing SEG relationships as well. Records for each SEG were automatically built in CallTrax using a data file from the old system. Then, with assistance from a CRM Consultant at MARQUIS, profiles were developed for capturing additional information such as the number of employees, branch assignment and date of last visit.

### Results:

The financial institution eliminated the other system, thereby eliminating annual support maintenance payments for that other program. All employees involved in the management of SEG relationships have access to those records, can view history of all activity with those SEG's, and can log notes directly into the system. This saves a great deal of time and ensures information is entered since it no longer has to be passed to someone else for input. CallTrax is a product they all use and are familiar with, so they feel this is the ideal solution for them.

The institution now manages a portfolio of **more than 100 SEG's**. They conducted **more than 120 visits** this year, including membership drives, and they gained **more than 500 new members** as a result of those visits.

## SOLUTIONS USED

| MARQUIS CRM |

**MARQUIS**