

CROSS-SELLING

MARQUIS CASE STUDY

Objective:

Capture new business from current households.

Analysis:

The \$110 million financial institution sought a deliberate, targeted strategy for introducing new products and encouraging a deeper relationship.

Action:

An ongoing trigger-based campaign was developed, with ten letter versions prompted by specific lifestyle, account opening, and other data-based criteria. Marquis OnTrax facilitates a personal approach, leveraging data to address the current circumstances of each recipient.

Results:

Over the course of a single quarter, an investment of just \$9,176 generated **\$45,764** in profit. The program has shown an average response rate of 6.85% and an **overall ROI of 399%**.



SOLUTIONS USED

| MARQUIS MCIF Services | MARQUIS Creative |

Trigger events
10 versions based on specific account opening and data criteria.
ROI: \$9,000 spent, \$46,000 profit.

