

CROSS-SELLING

MARQUIS CASE STUDY

Objective:

Utilize technology to accelerate the sales culture and to further enhance the client experience.

Analysis:

A \$350m financial institution needed to follow its plan to develop a top notch sales culture committed to enhancing the client experience. Their intention was to invest in a technology which would assist them in achieving their goals.

Action:

This financial institution began using ExecuTrax in September 2008. Their plan included implementation of referralTrax with an eventual upgrade to CallTrax in 2010 to meet the needs of their evolving culture.

Results:

Within the time span of September 2008, when they began using ExecuTrax, until August 2010, when they upgraded from referralTrax to CallTrax, they saw improvements in a number of critical areas.

- **Average Household Profitability** increased by **41%**, from **\$139 to \$196**
- **Average # of Services per Household** increased by **31%**, from **1.77 to 2.32**
- **Average # of Products and Services per Household** increased by **13.1%**, from **3.83 to 4.33**

SOLUTIONS USED

| MARQUIS MCIF Services | MARQUIS CRM |

MARQUIS