



# ONBOARDING

## MARQUIS CASE STUDY

### **Objective:**

Increase new household retention, cross sales, loyalty and profitability.

### **Analysis:**

The \$1.1 billion financial institution had low profitability and high attrition among new households. Within six months, 12.4% of these households had ended their relationship.

### **Action:**

An Onboarding Matrix Campaign was developed with Marquis' OnTrax and Creative team. The ongoing campaign included multiple customized points of contact, leveraging existing customer data to vary the communication pieces and using the Marquis CRM system to automatically generate follow-up calls to the recipients.

### **Results:**

Attrition for this segment has dramatically decreased by more than 42%, from 12.4% to just 7%. **New balances of over \$10 million** were achieved, with an **ROI of 1,099%**.

## **SOLUTIONS USED**

| MARQUIS MCIF Services | MARQUIS Creative |

# **MARQUIS**