



# ONBOARDING

## MARQUIS CASE STUDY

### Objective:

Enhance current onboarding strategies.

### Analysis:

A \$500m financial institution needed to refine their processes in order to effectively execute an onboarding strategy.

### Action:

Utilize ExecuTrax and CallTrax to achieve success. A marketing campaign matrix was designed to track new customers as they joined the financial institution. After three days, the customer was sent a mailing as a 1st point of contact. Automated features were used to create CRM logs for employees to make a 2nd point of contact 7-10 days later.

### Results:

By relying on the power of MCIF and CRM coupled with incentives, employees successfully reached out to new customers and reported impressive results after a 90-day assessment. The **average number of unique products** rose from **1.097 to 1.148**, while the **average number of unique products and services** increased to **3.635**, an improvement of **226%**. **Average household profit** improved from **-\$42 to \$107** and **total balances** climbed by **20%**.

## SOLUTIONS USED

| MARQUIS MCIF Services | MARQUIS CRM |

# MARQUIS