



# REBOARDING

## MARQUIS CASE STUDY

### Objective:

Increase penetration into high value segments.

### Analysis:

The \$878 million financial institution had a significant number of single service households. The decision was made to target these households in order to reduce attrition and solidify banking relationships.

### Action:

After a detailed customer segmentation, based on income producing assets outside the financial institution, customers were identified who had only one product, but were in a category with a higher propensity for banking relationships. This information was used to create a packaged offer.

### Results:

A robust response rate resulted in **successful cross-sales**, generating approximately **\$147,000 in annual profits** in just a 4-month period. A segmentation process was also completed for business customers, and ongoing marketing efforts are enhanced by support, training and expertise from the Marquis team.

## SOLUTIONS USED

| MARQUIS MCIF Software | MARQUIS CRM |

**MARQUIS**