



REFERRAL TRACKING

MARQUIS CASE STUDY

Objective:

Utilize technology to unify all sales and service activities.

Analysis:

A \$400m financial institution needed to leverage technology in order to unify sales and service activities, streamline operations and improve efficiency and internal communication.

Action:

By implementing CallTrax, all employees were able to log their customer activity and share vital information with other team members. Along with extensively detailed logs, profiles were created to assist with compliance and sales. Each new customer is asked specific questions while the employee enters the information on the spot. Back office employees use the data to assess risk ratings.

Results:

CallTrax has allowed this institution to collect and share data, thereby enhancing the customer experience. Additionally, employees can view their sales results and eligible incentives; performance and results have increased dramatically. Over a 12-month period, the following results were observed:

- **Number of Personal Checking accounts** increased by **9%**
- **Number of Personal Savings accounts** increased by **40%**
- **Number of Business Checking accounts** increased by **41%**
- **Total deposit dollars** increased by **7%**

SOLUTIONS USED

| MARQUIS CRM |

MARQUIS