



# REFERRAL TRACKING

## MARQUIS CASE STUDY

### Objective:

Improve the referral process and track prospects.

### Analysis:

The \$482 million financial institution had a very generous incentive program, but employees were reluctant to submit referrals because of a system that was slow and cumbersome.

### Action:

Marquis ReferralTrax was implemented, allowing employees to enter referrals in less than 30 seconds. The system offers a pop-up in the front-end and gives “instant gratification” with its daily updates. Managers are also able to track prospective customers and schedule follow-up.

### Results:

Closed (or sold) **referrals increased by about 44%**. Employee satisfaction has improved, as they get their incentives every pay period and the results of their efforts are clearly visible every day. Household profits are up 4.96%, total accounts are up 3.12%, and the **average number of unique products/services per household increased by 10.20%**.

## SOLUTIONS USED

| MARQUIS CRM |



**MARQUIS**