



CLIENT ACQUISITION

MARQUIS CASE STUDY

Objective:

Attract new customers.

Analysis:

The merger of the two largest banks in the state presented a window of opportunity for this \$350 million community bank. A quick response was needed to capitalize on the concern and irritation that often occurs among consumers when faced with this type of merger.

Action:

Recognizing that branch location is a key factor for customers, the financial institution launched a targeted direct mail program directed at people within a 2-mile perimeter of their seven office locations. Results were imported and managed through MarketTrax.

Results:

Over a span of four months, the financial institution opened new accounts for **251 households**, gaining **\$3 million in new deposits**.

SOLUTIONS USED

| MARQUIS MCIF Software |

