



CLIENT RETENTION

MARQUIS CASE STUDY

Objective:

Identify and retain the most profitable households—the ones every institution is targeting.

Analysis:

The \$325 million financial institution learned that the top 1% of households delivered 100% of their profit. With the national attrition average at nearly 15%, the institution felt they couldn't afford to lose these high value clients.

Action:

Marquis provided an expanded list of the top 2% of clients through MarketTrax, and key officers used CallTrax to initiate a calling campaign. The clients were contacted at least quarterly, with candy sent monthly to households in the top 2%. MarketTrax then tracked call impact.

Results:

Of 170 top clients, only 3 left the bank in the initial eighteen months. **Twelve new clients** were added to the list, and marketing tracked a **35% growth in deposits** from this high value group.

SOLUTIONS USED

| MARQUIS MCIF Software | MARQUIS CRM |

MARQUIS