

CROSS-SELLING

MARQUIS CASE STUDY

Objective:

Increase cross sales, profitability, member retention and loyalty.

Analysis:

The \$1.6 billion financial institution sought to enhance existing relationships through a segmented campaign based on product propensity.

Action:

Relationships with multiple accounts were researched and next product potential was determined for each. Each group was also broken down by value score segments and P\$ycle codes within the MCIF. Direct mail and PURLs (personalized URLs) encouraged an active response from recipients.

Results:

Within the first five months, loans and deposits of targeted members improved by **50%**. The personal loan initiative was particularly successful, generating **\$2.5 million in new loans** and a **534% ROI**.

The collage displays six direct mail pieces, each with a personalized message and a call to action:

- Top Left:** "Your choice, Louise!" with a photo of a woman and a car.
- Top Middle:** "Reward Checking gives you lots of options." with a photo of a woman.
- Top Right:** "Make a memory, Mary Ann." with a photo of a family.
- Middle Left:** "Home Equi Loan Sale Rates as low as 4.99%" with a photo of a kitchen.
- Middle Right:** "Harold, dream big." with a photo of a man in a kitchen.
- Bottom Left:** "Time to upgrade, James!" with a photo of a woman and a man painting a wall.
- Bottom Middle:** "It's your account. Use it your way!" with a list of benefits and a "Call" button.
- Bottom Right:** "It's your account. Use it your way!" with a list of benefits and "Click" and "Visit" buttons.

SOLUTIONS USED

| MARQUIS MCIF Services | MARQUIS Creative |

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