



# CROSS-SELLING

## MARQUIS CASE STUDY

### Objective:

Utilize CRM to increase sales of electronic services.

### Analysis:

This \$90m financial institution with a well-developed sales and service culture needed to increase cross-sales of electronic services in order to enhance customer experience while increasing loyalty and retention.

### Action:

By combining on-going training for CallTrax and product training for electronic services, team members were able to offer appropriate electronic services to customers. CallTrax was utilized for logging, tracking and reporting all related activity.

### Results:

Within a 12-month period, the number of total Bill Pay users **increased by 44%**, while active Bill Pay users **increased by 67%**. E-Statements **improved by 86%** while the E-Statements to Checking ratio **increased by 76%**. Revenue per employee **improved by 59%**.

## SOLUTIONS USED

| MARQUIS CRM |

**MARQUIS**