



DEPOSIT GROWTH

MARQUIS CASE STUDY

Objective:

Use Beacon scores to target new deposits.

Analysis:

The \$336 million financial institution sought to capitalize on the strong correlation between the ability to save and an individual's beacon score.

Action:

A limited time "Lucky 7" Certificate of Deposit was offered, paying 7.00% for a 7 month term with a minimum investment of \$700. In addition to newsletter articles, statement stuffers and other broad communications, targeted direct mail was sent to households with Beacon scores of 650 or higher and to those without a Beacon score but with \$7,500 or more in deposits.

Results:

The three-month campaign **exceeded its goal by 120%**, bringing in **2,133 CDs** for a total of **\$28.3 million**. More than **160 new customers** took advantage of the special offer and brought in **\$3.5 million in new money**.

SOLUTIONS USED

| MARQUIS MCIF Software |

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