



LOAN & DEPOSIT GROWTH

MARQUIS CASE STUDY

Objective:

Leverage information when making profitability decisions.

Analysis:

The \$110 million financial institution wanted to take a proactive approach to customer relations, using actionable intelligence whenever possible.

Action:

Over the past seven years, nearly every decision impacting customers and profitability was examined directly or indirectly through MarketTrax.

Results:

Ongoing use of the analysis tool has provided recommendations that contributed about **\$3.52 million** to the financial institution's bottom line, including a **40% increase in HELOCs**, **\$350,000 in Skip-A-Pay income** and approximately **\$2 million in CD deposits** through a single campaign.

SOLUTIONS USED

| MARQUIS MCIF Software |

MARQUIS