

ONTRAX

MARQUIS CASE STUDY

Objective:

Leverage the power of data-driven information to boost profitability.

Analysis:

The \$1 billion financial institution sought an integrated, proactive strategy that would encompass loan growth, deposit growth, onboarding, cross-selling and retention.

Ongoing tracking and accurate targeting were key priorities, underscoring the importance of expert data analysis.

Action:

A team approach was launched involving the client, consultant, creative team, and reliable, actionable data. Initiatives included monthly onboarding letters and emails, anniversary letters, ongoing account opening postcards, preapproval offers and trigger-based letters and emails promoting specific products.

With the marketing sequences established and the designs in place, the programs now run seamlessly. Continuous tracking allows the institution to gauge the effectiveness of the campaigns, and the Marquis consultant and creative team are ready to take action if any adjustments are needed.

As an example, several campaigns were recently modified to include versions aimed at a "Gen Y" audience. Fresh copy and eye-catching images speak to this specific group, helping to build relationships with the younger generation.

Results:

Over the course of a year, the institution generated over **3,000 new accounts**. With a **net annual profit of \$1.07 million**, the campaigns achieved a combined **ROI of 481%**.

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Jeanette,
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SOLUTIONS USED

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