



ONBOARDING

MARQUIS CASE STUDY

Objective:

Build loyalty and retention among new households.

Analysis:

The \$60 million financial institution was looking for ways to welcome households and educate them on products and services, recognizing that this group has the greatest potential for responding to offers.

Action:

An 8-flight ongoing onboarding campaign was developed, building on the financial institution's new branding initiative. New households were introduced to key products, with incentives to add excitement.

Results:

In just the first four months of the campaign, the financial institution cross-sold **80 additional accounts**. These sales resulted in **\$378,159 in new balances and over \$16,183 in net profit**. The ROI of the onboarding campaign was **955%**.

SOLUTIONS USED

| MARQUIS MCIF Services | MARQUIS Creative |

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