

# REBOARDING

## MARQUIS CASE STUDY

### Objective:

Sustain and deepen customer relationships after the first year.

### Analysis:

The \$1 billion financial institution wanted to continue the momentum from a successful onboarding program, recognizing the potential for a drop-off in communication and loss of opportunity at the end of the onboarding flights.

### Action:

Households who had reached an anniversary relationship mark were assessed and analyzed in order to determine what their next most likely product would be. Utilizing the knowledge of their next product potential, households were targeted and contacted based on their 1 year, 18 month and 2 year anniversaries with product offers matching their propensity.

### Results:

With a very successful response rate of **4.61%** and new balances of over **\$790k**, this campaign matrix yielded an **ROI of 616%**.

## SOLUTIONS USED

| MARQUIS MCIF Services | MARQUIS Creative |

The collage displays four email newsletters, each with a yellow header and a blue footer. The newsletters feature various images and text:

- Newsletter 1:** Features a speedometer icon. Text: "MAXIMIZE YOUR MEMBERSHIP! Thank you for being a member of Local Government Federal Credit Union. Members like you keep us financially strong and growing, which in turn allows us to provide great financial products and services to all our members. Our goal is to make money management easier and as cost-effective as possible."
- Newsletter 2:** Features an image of a person in a blue shirt. Text: "MAXIMIZE YOUR MEMBERSHIP! Auto Loans. Great Rates. Generous Terms. Affordable! Earn More. Save More. Move your checking to . VISIT"
- Newsletter 3:** Features an image of a hand holding cash. Text: "MAXIMIZE YOUR MEMBERSHIP! Earn More. Save More. Move your checking to . VISIT"
- Newsletter 4:** Features an image of a wallet. Text: "MAXIMIZE YOUR MEMBERSHIP! cover the Flexibility Personal Loans Provide. VISIT"

The bottom newsletter includes a detailed text block:

**Our Visa® is a great example.**  
One low rate and minimal fee make it the one credit card you can feel good about using. See the back of this letter for our user-friendly terms.

**Money-saving features.**  
Our variable EAR/APR rate is lower than many bank and store credit cards.

- Save. You get the same rate for purchases and advances, and you won't be locked by low introductory rates.
- Save. No annual fee keeps cash in your wallet.
- Save. Manage your account online—even pay your bill—and save time.

An Visa card is a wise financial choice. Apply online, call or visit your local branch today.

Once again, thank you for your membership. We look forward to serving you for many years to come.

Sincerely,  
  
Maurice R. Smith  
President

CALL 888.732.8562 | CLICK | VISIT

# MARQUIS