



REFERRAL TRACKING

MARQUIS CASE STUDY

Objective:

Increase the number of product referrals and sales.

Analysis:

The \$1 billion financial institution used an outdated referral system, tracking product referrals through carbon copy half-sheets of paper that were often lost, misplaced in transit, or delayed through the in-house courier system.

Action:

With referralTrax, the front line was able to see in one screen shot every product that a household owned – and more importantly, which products or services they did not yet possess. By automating the process and moving information in real time through electronic means, all leads became hot leads. Customers loved the prompt response, and the staff was invigorated by faster results and an enhanced reward system.

Results:

Within just 60 days, the financial institution went from **400 referrals** a month to **over 1,500 a month**, not to mention saving hundreds of hours that were previously spent manually tracking and managing the referral program.

SOLUTIONS USED

| MARQUIS CRM |

MARQUIS