MARQUIS

DATA-DRIVEN

MEMBER EXPERIENCE

Assemble, Analyze, Act on your Data and Increase your ROI

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TRANSPERENT | AUTOMATED | MULTI-CHANNEL

Data Driven Member Experience

SHIFTING MEMBER EXPECTATIONS

MARQUIS

SPRAY & PRAY
One size fits all

SEGMENTATION
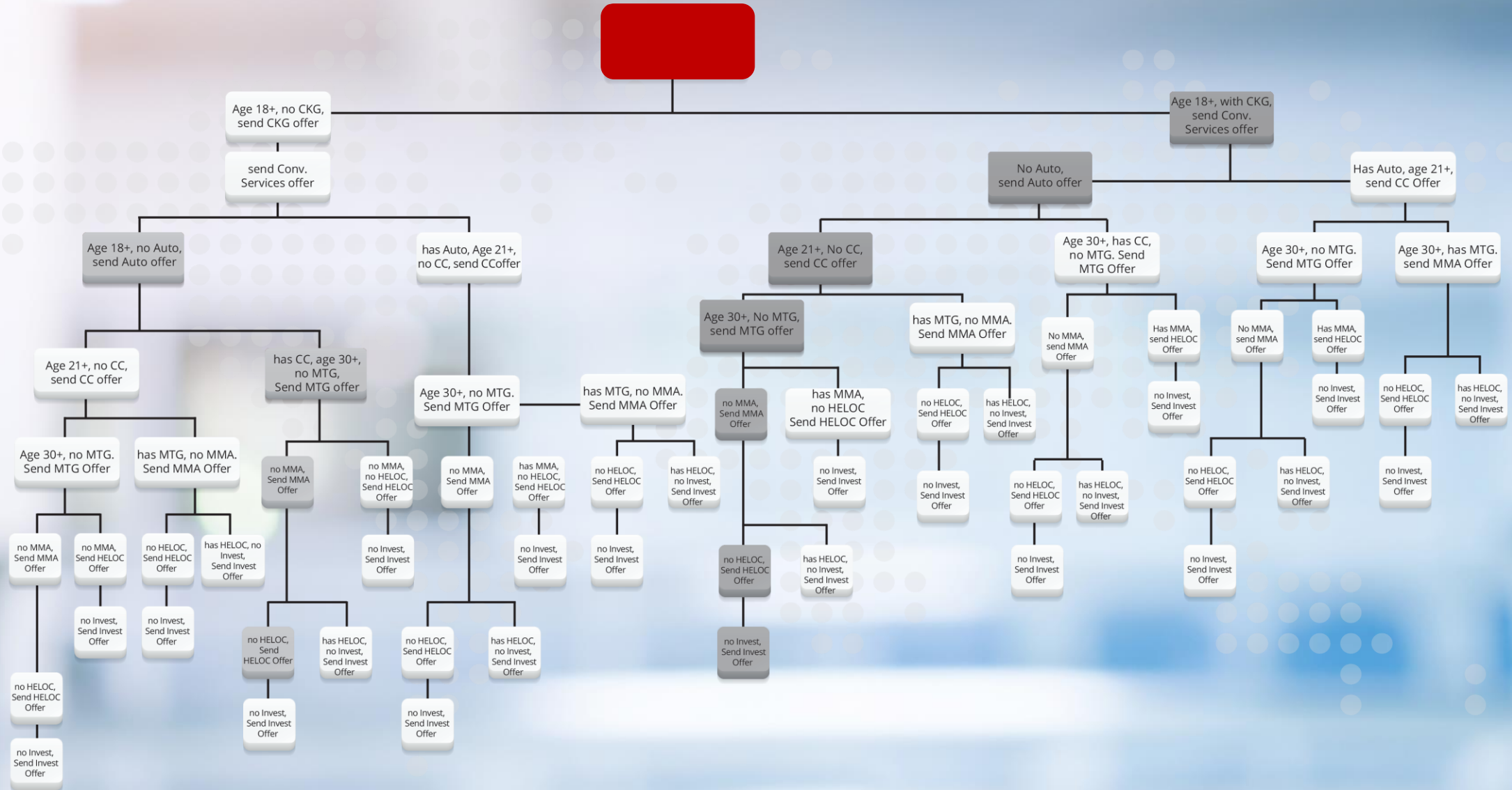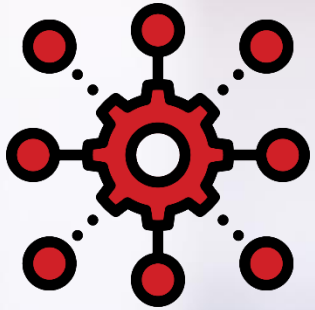One size fits some

PERSONALIZATION
One size fits me

INDIVIDULIZATION
My size for me by me

MEMBER JOURNEY - DYNAMIC MATRICES

Age 18+, no CKG, send CKG offer

Age 18+, with CKG, send Conv. Services offer

send Conv. Services offer

No Auto, send Auto offer

Has Auto, age 21+, send CC Offer

Age 18+, no Auto, send Auto offer

has Auto, Age 21+, no CC, send CCoffer

Age 21+, No CC, send CC offer

Age 30+, has CC, no MTG. Send MTG Offer

Age 30+, no MTG. Send MTG Offer

Age 30+, has MTG. send MMA Offer

Age 21+, no CC, send CC offer

has CC, age 30+, no MTG, Send MTG offer

Age 30+, No MTG, send MTG offer

has MTG, no MMA. Send MMA Offer

No MMA, send MMA Offer

Has MMA, send HELOC Offer

No MMA, send MMA Offer

Has MMA, send HELOC Offer

Age 30+, no MTG. Send MTG Offer

has MTG, no MMA. Send MMA Offer

Age 30+, no MTG. Send MTG Offer

has MTG, no MMA. Send MMA Offer

no MMA, Send MMA Offer

has MMA, no HELOC Send HELOC Offer

no Invest, Send Invest Offer

no Invest, Send Invest Offer

no Invest, Send Invest Offer

no Invest, Send Invest Offer

no Invest, Send Invest Offer

Age 30+, no MTG. Send MTG Offer

has MTG, no MMA. Send MMA Offer

no MMA, Send MMA Offer

no MMA, no HELOC, Send HELOC Offer

no MMA, Send MMA Offer

has MMA, no HELOC, Send HELOC Offer

no HELOC, Send HELOC Offer

has HELOC, no Invest, Send Invest Offer

no HELOC, Send HELOC Offer

has HELOC, no Invest, Send Invest Offer

no MMA, Send MMA Offer

no MMA, Send HELOC Offer

no HELOC, Send HELOC Offer

has HELOC, no Invest, Send Invest Offer

no Invest, Send Invest Offer

no Invest, Send Invest Offer

no Invest, Send Invest Offer

no Invest, Send Invest Offer

no Invest, Send Invest Offer

no Invest, Send Invest Offer

no Invest, Send Invest Offer

no HELOC, Send HELOC Offer

has HELOC, no Invest, Send Invest Offer

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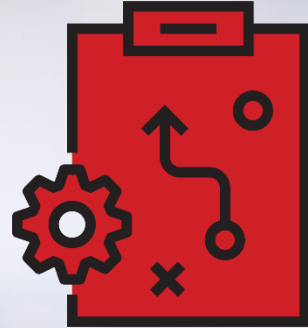
no Invest, Send Invest Offer

What if it all worked together?

Data Assembly

Data Cleansing

Householding

Demographics

Profitability

Website Tracking

Strategic Analysis

Predictive Analytics

Propensity Modeling

Peer Comparisons

Segmentation

Recommend Strategy

Marketing Action

Marketing Automation

Campaign Construction

Seamless Marketing Fulfillment

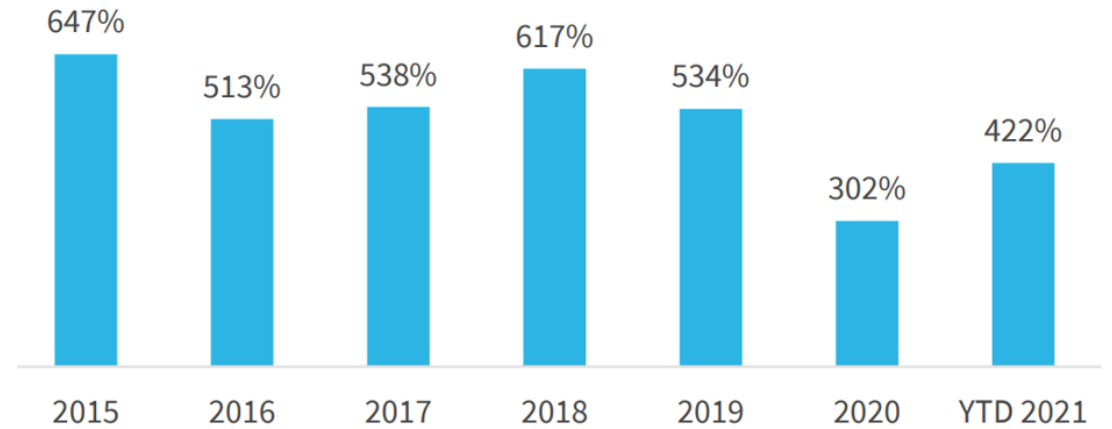Results Tracking

Sales & Service CRM

Contact Management

Front-line Prompting

Referrals

Incentives

Process Management

TRIGGERS: IMPACT ON ATTRITION

$2 Billion Institution
Based on Lost Households

- **2016 Attrition Rate: 7.94%**
- **2017 Attrition Rate: 7.41%** (-0.52%)
- **2018 Attrition Rate: 6.57%** (-0.85%)
- **2019 Attrition Rate: 5.63%** (-0.97%)

3 YEAR CASE STUDY

IS YOUR DATA **ACTIONABLE?**

DOES YOUR DATA DRIVE **RESULTS?**

DOES YOUR DATA ENHANCE **MEMBER EXPERIENCE?**