

51 QUESTIONS

YOU WILL KNOW BY USING THE KEYS!

BETTER ENGAGEMENT

Discover relationship insights and opportunities to increase revenue.

BETTER STRATEGY

See an interactive view of customer data.

BETTER LEADERSHIP

Share information and knowledge to educate your team.



MARQUIS

**MOVE
MARKETING
FROM THE
BACK ROOM
TO THE
BOARDROOM!**

To drive revenue and engagement, you have to know what to ask of your data and share the analysis with your team to impact revenue and engagement across the organization. All at scale. Not a single marketing event. Not in the silo of the marketing department. Achieve this, and marketing moves from the backroom to the boardroom.

The KEYS are designed to give you greater actionable insight into your data. It is a culmination of hundreds of years of FI marketing experience packaged to be viewed from most screens and shared across your organization. Each KEY addresses a facet of marketing communication critical to driving revenue and engagement.

So what questions can the KEYS answer for you?

1. You have a board meeting and need to explain the impact of attrition, its warning signs, and how to reduce it.
2. You need deposit growth and want to minimize deposits walking out. What is your recommendation?
3. You need loan growth to increase ROA with minimizing attrition for loans.
4. You realize 75% of your HHs are Baby Boomers and older. What can you do to minimize younger HHs leaving the FI?
5. Your COO comes to you and asks what products the frontline needs to push in the first 30 days. What is your recommendation?
6. Your executive and operation teams want to know auto loan buyers' profiles.
7. What is the profile of a checking user, and what is the strategy to grow that product?



STAGE is an analysis of the prominent life stage groups within your base using the P\$YCLE codes provided by Claritas.

8. Your CFO is challenging the team. She is asking whether marketing is effective. What is your fact-based answer?
9. What is your recommendation to increase mortgage adoption from a marketing and sales perspective?

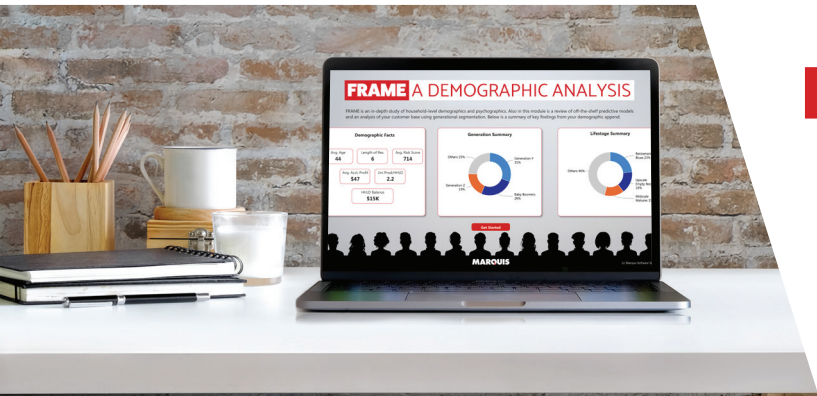
10. You are attending the board meeting in 10 minutes to present a plan to generate \$10M in the next 120 days. What should you do?
11. We are doing an online prospecting campaign for Millennials and promoting credit cards. To find look-a-like online targets, we need to provide an in-depth profile of our Millennial customers. What is your recommendation?
12. We need to create cross-sales goals for our branches. How would we develop goals using the FRAME Key?
13. We need to close a branch. What do we risk in doing this?
14. We are concerned with losing mature customer deposits and want to implement a wealth transfer program. What is the risk?



CHURN focuses on lost households and their impact on the growth of your organization.

15. Is the profile for customers new to our organization within the last two years different from our overall customers? What attributes/traits are prominent with our more recent customer base that we are not currently addressing?
16. What kind of potential do your newer customers present?
17. What are newer members contributing in terms of profitability?
18. Which branches offer the most potential?
19. In what way(s) can you drive engagement with minimally engaged customers or members?
20. When are the best months to promote home equity loans? To whom should we communicate?
21. You have a quick marketing meeting in 10 minutes and need to make recommendations on marketing campaigns for the next 90 days.
22. Your CEO calls you and lets you know we need more deposits for the last half of the year. What is your recommendation?

23. You have a money market & certificate promotion you want to kick off. What steps would you take to find the right audience and timing?
24. Your community has high competition for CD rates right now. Hot money is moving fast. So which Lifestage group has the best chance for a CD cross-sale?



FRAME is an in-depth study of household-level demographics and psychographics.

25. The lending department wants to run a pre-approved auto campaign; however, before purchasing pre-approved credit data, they want an idea of the number of households within a five-minute drive of all branches with an annual income greater than \$75,000.
26. ALCO Committee is asking for a checking account campaign. What is the average balance for checking accounts within a 5-minute drive from your branches?
27. Your financial institution wants to roll out a junior banker program. You are curious which Lifestage segments have middle-aged families and possibly children. How can you see a narrative of each Lifestage segment?
28. What is our annual attrition YOY? How does that compare to Peer?
29. What is our cross-sales opportunity for financially unsavvy consumers?
30. What months should we promote IRAs and Money Market accounts?



STICK explores the potential and performance of your product portfolios and household relationships.

31. Which Lifestage segments have the highest overall balances? And what is the product mix?
32. How can I create a by-branch marketing plan using data from the past 2 years of product sales?
33. What percent of households leave us when they have fewer than three products?



MAP provides a discovery of each branch's demographic, psychographic, and financial behavior.

34. Does tenure impact attrition?
35. How many credit card accounts are at risk due to inactivity?
36. How many auto loan accounts are at risk of attrition due to maturity?
37. What is our customers' average household balance, average age, and profitability?
38. What is the balance impact of adding additional products to a household?
39. What are the top three home purchase months?
40. You need to create a demographic and psychographic profile of a money market owner. What is your recommendation?
41. Based on who is in the market for a mortgage, how many members are at risk of leaving us?
42. Based on who is in the market for a new home purchase, what is the dollar opportunity based on our average mortgage balance?
43. Based on members who are likely to have a certificate, how many customers look like they should have a certificate with us but currently do not?
44. What are our top three products in terms of profit margin?

45. Does the number of marketing campaigns received translate into more product sales?
46. What is the difference in product sales per household with three or more campaigns received?
47. Based on our sales data, when are the best months to market home equity loans?



ACT is a review intended to give you a first-hand glimpse of the opportunity in your data.

48. What are the household penetration rates of our products? How does this compare to Peer?
49. What is the correlation between the number of accounts and the average balance?
50. What products are opened and in what order by new households?
51. What is the percentage of low-balance households to our total membership?

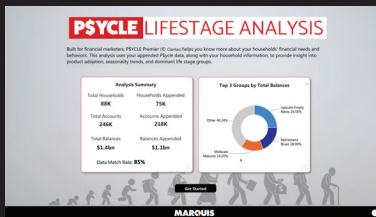
The KEYS include interactive deep dives into attrition, product adoption, demographics, psychographics, geographics, and profitability. The KEYS are a combination of 350 data points, 900 measures, and over 50 screens of your data. Additionally, we have added built-in peer comparisons from a database of 3M households.

What are you waiting for?

Schedule your demonstration today.

THE KEYS ARE A PACKAGE OF SIX INTERACTIVE TOOLS.

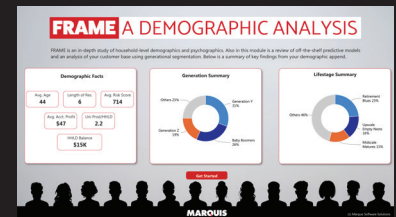
Each KEY brings your ExecuTrax data to life and gives you the power to do more, know more, and lead your marketing team.



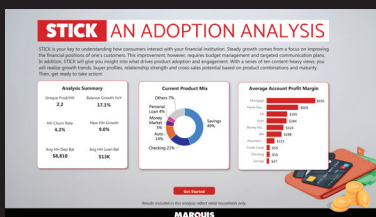
STAGE
Lifestage Analysis



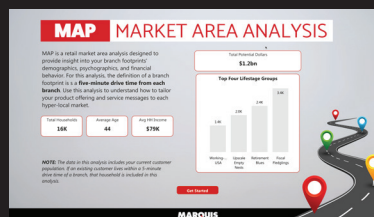
CHURN
Relationship Attrition



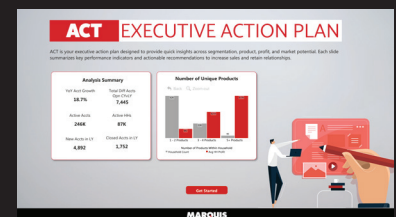
FRAME
Customer Demographics



STICK
Product Adoption



MAP
Market Analysis



ACT
Executive Action

SCHEDULE A DEMONSTRATION