e-book

Roadmap to CRM Success:

Align Culture, Drive Adoption, Fuel Growth

marquis

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I. INTRODUCTION

From Stuck to Strategic

A CRM amplifies your culture.

Let's Start with a Hard Truth

CRM will not change your culture, create clarity where none exist, or turn a passive sales culture into a high-performing growth engine.

CRM amplifies your culture. If your culture is aligned, your goals are clear, and your teams are engaged, CRM can turbocharge your strategy.

If you've ever said:

- "We launched our CRM, but nobody's really using it."
- "We're still building it out."
- "We have it, but it's not giving us the insight we expected."

You're not alone and you're not stuck because of the CRM. You're stuck because the strategy around it hasn't taken root.

CRM TRUTH

CRM will not change your culture; it will expose it.

What "Stuck" Really Means

Financial institutions (FIs) tend to fall into one of three "stuck" categories:

1. Stuck Before You Begin

You know CRM matters, but you're unsure what it should actually do for you. You're hesitant to make the wrong decision or you've seen others fail. Your decision-making path is measured in years, not months.

2. Stuck in the Middle

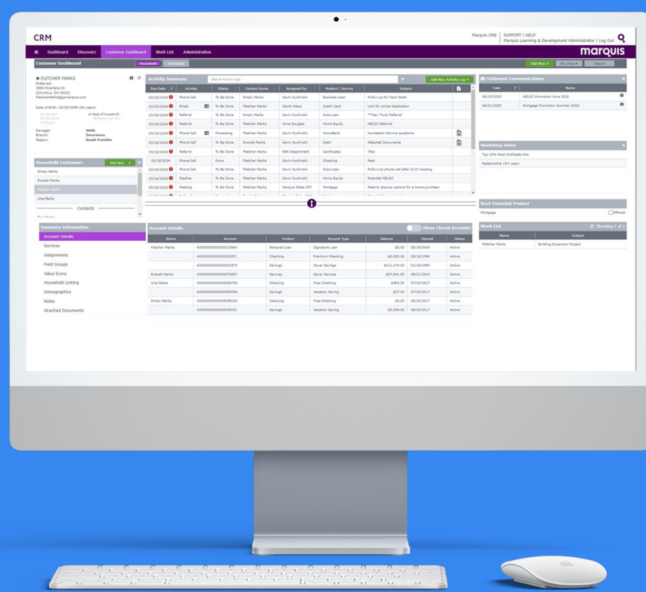
Your CRM is live but usage is inconsistent, leadership is detached, and outcomes are fuzzy. What was supposed to drive transformation now just feels like more software.

3. Stuck in Denial

You've made the investment. But deep down, you know you're not using CRM as a strategic tool. It's not integrated into your culture or conversations and it's not producing results.

CRM success starts with asking the right questions.

- What are we trying to achieve and will CRM actually help?
- Are we designing for people, not just processes?
- Who owns this and are they empowered to lead it?
- Are we willing to hold people accountable to using it?
- Are we being practically honest about what's achievable?



A Strategic Misalignment

Here's the pattern that's often repeated in banks and credit unions:

A CRM system is purchased as a presumed solution.

Implementation begins and is led by IT or a vendor, lightly touched by leadership.

Usage fails without engagement, modeling, and accountability.

Frustration sets in and the CRM is seen as a failure.

CRM did exactly what it was supposed to do, but your strategy, expectations, and accountability are not aligned.

CRM TRUTH

CRM success is 90% leadership.

Three Audiences, Three Roles

For CRM to move from stuck to strategic, you need to activate three groups, each with unique responsibilities:

1. Senior Leadership

Strategic direction, investment, cultural modeling, and accountability.

2. Technology & Project Teams

Technical execution, data integrity, system usability, integration.

3. Sales & Service Staff

Daily usage, customer or member insights, referrals, and front-line feedback.

Each group must be part of the CRM journey from planning to implementation to execution. No single team can carry CRM alone.

Important Questions to Ask

- What are we actually trying to achieve?
- What has to happen to know we are successful?
- Who is ultimately accountable for CRM adoption?
- Do we want a CRM to reflect who we are, or who we want to become?

CRM TRAP

Ownership and accountability starts at the top.

This journey is change management. An executive sponsor needs to be actively involved and visible throughout this entire journey, helping guide the entire process.

What This eBook Will Do

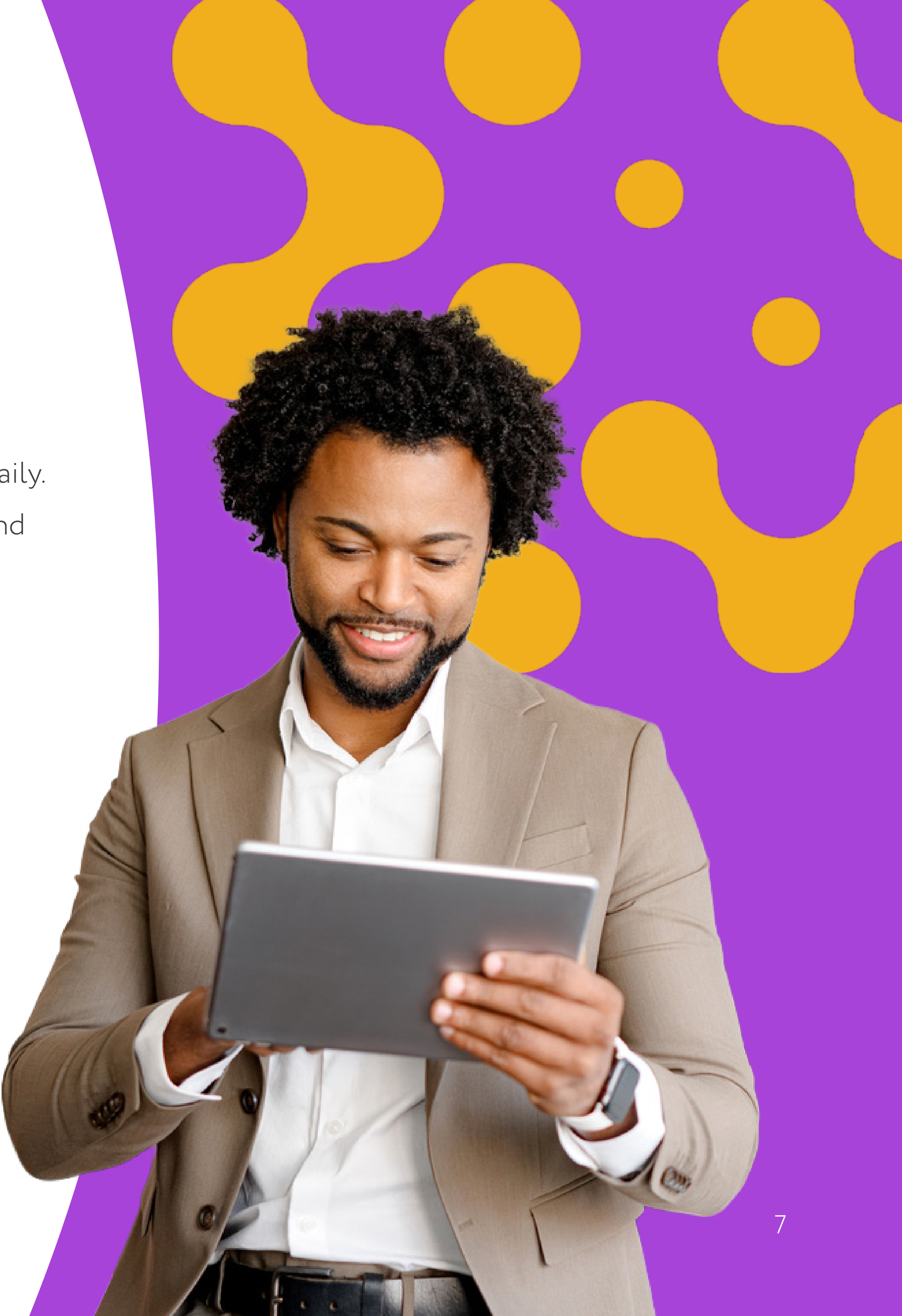
This ebook will help you:

- Build a clear, honest plan grounded in what you actually want CRM to do.
- Implement with input from those who will use it daily.
- Create a framework for long-term accountability and cultural adoption.

You'll learn how to:

- Make the case to your executive team.
- Set up CRM around your goals, not industry hype.
- Keep the focus on practical, actionable outcomes.
- Avoid the common traps that stall adoption.
- Turn your CRM into a tool your teams will use and your leaders will trust.

Stop checking the CRM box and start building your CRM culture.



Define Strategic Intent

CRM isn't a starting point. It's a journey from where you are to where you want to go.

Start With the Destination, Not the Database

Before you buy a license, define a field, or draft a training module, you have to answer one big question:

What are we building this CRM to do?

CRM is a tool but like any tool, its value depends on how and why you use it. Most FIs stumble because they skip this step. They get excited about dashboards, workflows, and customer or member insights. They misjudge the level of change required of their bank or credit union to make the CRM successful.

FIRST CRM VS. REPLACING CRM:

Two Starting Lines, One Destination

Not every institution begins their CRM journey the same way. The good news? No matter where you're starting, the path forward is the same: Start with the destination, not the database.

If You're Choosing Your First CRM

You're likely motivated by one (or more) of the following:

- Leadership wants better visibility across teams or regions
- Marketing wants to track engagement and response more precisely
- Sales wants a way to capture leads and manage pipelines
- Operations wants more consistency in processes and referrals

This is a powerful moment. You have no bad habits to undo. No legacy systems to overcome. But it also means you're building in the dark unless you slow down to clarify a few things.

Questions to Ask:

- What are we trying to improve, such as sales performance, customer service, cross-team collaboration?
- Do our senior leaders agree on CRM's purpose?
- What will success look like 3 months in? 12 months in?

ADVANTAGE

You're not burdened by "the way we've always done it."

RISK

You'll be tempted to make CRM a catch-all or under-plan in the rush to "just get started."

If You're Replacing a CRM That Didn't Work

You've already felt the pain of missed expectations. Maybe your old CRM:

- Was never used consistently
- Didn't match your workflows or goals
- Lacked the flexibility your teams needed
- Was too complex, too generic, or too siloed

But this time around, you have something incredibly valuable: experience.

Questions to Ask:

- What did we hope CRM would do for us last time?
- What specifically didn't work — system, leadership, process, data?
- What feedback have users given us that we haven't acted on yet?
- Are we truly willing to lead differently this time?

ADVANTAGE

You have scars, which means you also have wisdom.

RISK

You may carry forward old assumptions or settle for "less bad" instead of aiming for right.

Insights That Turn Experience into Strategy

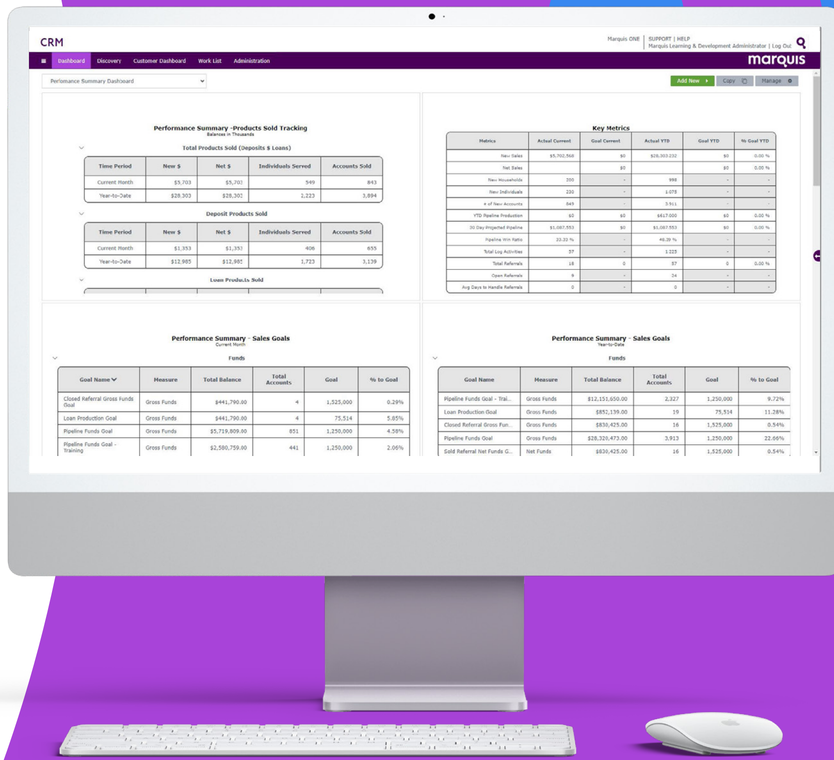
No matter which group you're in, you already know more than you think. Here's how to use that knowledge:

You know where alignment breaks down, leverage those insights early to define clear ownership and communication plans.

You've heard excuses or objections, use those to shape a better implementation with fewer clicks, more clarity, real workflows.

You've seen what leaders pay attention to (or ignore), design CRM around what actually drives discussion and decisions at the leadership table.

You know what your staff will actually do, don't build for an ideal workflow, build for one that's 90% realistic and 10% aspirational.



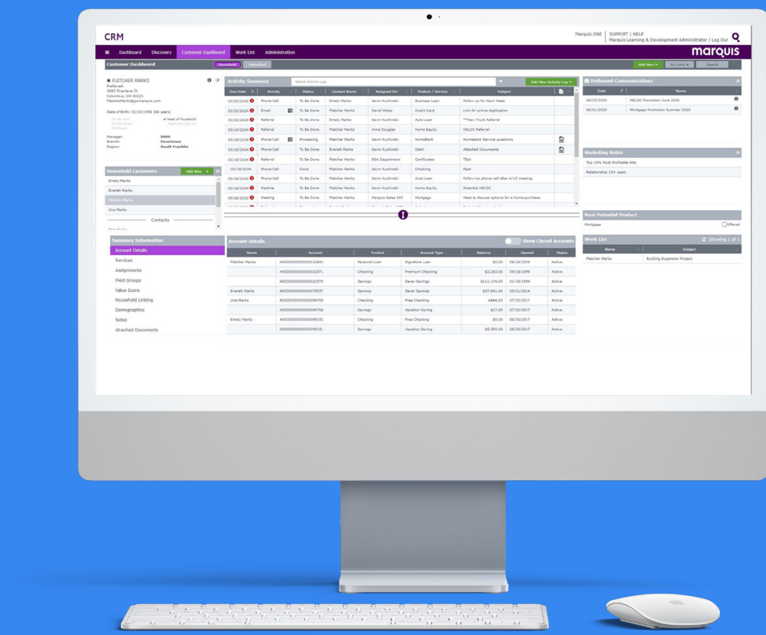
CRM only works when it serves your actual goals, not just your good intentions.

CRM Must Serve a Strategy, Not Replace One

The biggest myth in CRM? “Once we install it, we’ll figure out how to use it.” That’s how you end up with bloatware, frustration, and shelfware. CRM won’t give you direction, it will simply magnify whatever direction (or confusion) you already have. This is your opportunity to define what CRM will solve for, what it will measure, and what you’re willing to enforce.

The Hard Question Most Teams Avoid

- What are we actually willing to hold people accountable to?
- What do you current track or will have cultural buy in to track and use?
- What are you actually willing to monitor, review, coach to, and enforce?



Three Strategic Lenses for Planning CRM

Following this path helps you create your foundation.

1

SENIOR LEADERS

Define the "Why" and Commit to the "How"

This group writes the check, sets the tone, and shapes the culture. If senior leadership doesn't know why CRM matters, or can't clearly explain it, no one else will follow and you'll only have confusion.

Five Questions for Senior Leaders:

1. What strategic outcomes are we expecting CRM to drive, such as sales growth, customer or member loyalty, efficiency, insight?
2. What expectations are tied to specific KPIs, dashboards, and performance conversations?
3. Who on the leadership team is visibly championing and using CRM, and has the authority to provide leadership to all your expected users or departments? How will CRM usage show up in coaching, reporting, huddles, and reviews?
4. What behaviors are we willing to consistently inspect and hold people accountable to?

If your senior team isn't using CRM or asking about it, no one else will either. Leadership behavior sets the ceiling for adoption. Leadership accountability will set the floor.

2

TECHNOLOGY & PROJECT TEAMS

Define the "What's Possible"

This group is responsible for turning strategy into systems. But that only works if they're part of the conversation early. Don't ask IT to build CRM in a vacuum, ask them to be honest about what's feasible, scalable, and user-friendly. And who's going to own the optimization and ongoing technology needs post implementation.

Five Questions for Tech & Project Teams:

1. What data sources do we have today that can realistically be integrated into CRM?
2. What systems will CRM need to align or coexist with?
3. Where will we hit limitations on reporting, permissions, APIs, or workflows?
4. Can we segment access or visibility based on roles or departments to reduce clutter?
5. What do we need from leadership to maintain the system post-launch?

Your CRM won't do everything. But if built realistically, it can become your single source of truth it will become an important tool that users find value in using.

3

SALES & SERVICE STAFF

Define the "What's Practical"

These are your everyday users, the people who will make or break CRM adoption. Too often, their voices are left out until go-live. Build around their pain points, their workflows, and their language.

Five Questions for Sales & Service Teams:

1. What do we actually need to know to serve or sell better?
2. Which activities (referrals, follow-ups, service issues) should CRM help us manage day-to-day?
3. How many screens, clicks, or steps are too many before we start tuning out?
4. Where do we already track things manually that CRM could replace or improve?
5. What incentives, coaching, or recognition would make CRM usage feel valuable not just required?

If CRM feels like more work with no benefit or reward, usage will evaporate the moment the spotlight moves.

Bringing it Together

When all three groups answer these questions together, alignment becomes real and not assumed. The most successful CRM implementations don't start with software, they start with people:

Leaders

define the why and model the way.

Tech teams

build what's possible and sustainable.

End users

help shape what's practical and usable.

That's what it means to plan strategically.

Common Pitfalls During Planning:

Planning around features, not goals.

Many FIs make a list of things CRM "can do" without tying them to a clear purpose. Just because you can track referrals, activities, cross-sells, and documents doesn't mean you should, at least not all at once.

For instance:

1. Tracking everything but using nothing.
2. Launching a sales pipeline, without having a sales culture.
3. Integrating tools no one asked for.

Common Pitfalls During Planning:

Treating CRM as a universal solution.

CRM should reflect your FIs priorities. It might start as a service tool, a referral engine, or a sales hub. It doesn't have to be everything to everyone from day one.

For instance:

1. Expecting a CRM to be the one true solution, which is simply not realistic.
2. Expecting to build all departments' workflows at once, which is unlikely with most FI's resources.
3. Trying to solve cross sell, sales, and customer service needs on day one, forgetting you must manage through change.

CRM TRAP

Avoiding the accountability conversation.

Many senior leaders assume others will figure out how to "drive adoption." But frontline adoption flows from leadership clarity. If no one is responsible for using it, no one will. The "Who" needs to be well defined early in any CRM discussion.

If you can't enforce it, don't build it.
It's better to launch a simple, enforced process than a complex, ignored one.

What Success Looks Like at the End of "PLAN"

By the time you finish this phase, you should have:

- Clear CRM goals tied to actual business outcomes.
- Defined ownership across leadership, tech, and users.
- A realistic understanding of what data and workflows are practical.
- A shared agreement on what CRM will and won't be used for.
- Early engagement with your frontline teams to seed buy-in.

This is the most important part of your CRM journey. Without strategic clarity through planning, the rest is just configuration.

CRM TRUTH

Winning hearts and minds is just as important as putting out a quality product.

III. IMPLIMENT

Build for Real People, Real Results, and Your Reality

CRM isn't built for the boardroom. It's built for the boardroom and the branch.

This is Where Plans Meet Reality

You've defined the strategy. You know your goals, your priorities, and your stakeholders. Now comes the part that makes or breaks CRM success: building the system to serve real users in real situations.

This is where good intentions collide with daily friction, too many clicks, unclear workflows, disconnected data, or worse: a system nobody understands or trusts. A CRM that works on paper doesn't help you if it frustrates the people who actually use it.

CRM TRUTH

The best CRM isn't the most powerful. It's the one your team will actually use.

Usable > Impressive

When implementing CRM, complexity is your enemy and change is your roadblock. Flashy features don't matter if users don't see how they help. And the more friction you introduce, extra steps, dropdowns, checkboxes, the faster adoption erodes. Easy always wins over impressive.

Instead, ask:

- What's the fewest number of steps needed to complete this task?
- Where can we automate behind the scenes so users stay focused on their work?
- How do we make it obvious what's expected without needing a manual?
- Will this improve how we work?

One of the biggest mistakes in CRM implementation is letting a project team design the system in isolation. It's tempting to move fast with tech teams, vendors, or consultants. But without input from end users, especially sales, service, and support, you're building blind.

CRM TRUTH

The best CRM isn't the most powerful. It's the one your team will actually use.

DATA

More Isn't Always Better

One of the biggest pain points in implementation? Data.

Everyone wants the system to "have everything", every account detail, every interaction, every lead. But here's the reality, you need less data than you think. Frontline users will not be using your CRM as their only source of data or insights.

This is where FIs lose site of their strategic goals. The goal is to think through how to better service your customer or member. Focus on streamlining usage that improves the customer experience and communication between departments more than the total sum of data available in your CRM.

For instance:

- What do we already have?
- What do we really need to act?
- What's non-negotiable for our core use case?
- What can we add later, once usage is proven?

CRM TRAP

The data that's in your CRM at launch will be 90% of what you're still using five years from now.

The push to optimize your CRM slows once solutions are implemented, training is complete, and friction points are fixed. Major remodels or new data loads are unlikely. Your team will use the tool—successfully or not—based on how you enforce accountability.

WORKFLOWS

Don’t Just Mirror the Old Way, Improve It

CRM is a chance to streamline, not replicate, the way you do things. But don’t assume users will embrace new workflows just because they’re “in the system.”

Instead:

- Design workflows that save time or eliminate manual steps starting with current pain points
- Align workflows to things users already care about like referrals, incentives, and customer or member resolution
- Focus on 1–2 high-impact workflows that drive visibility and behavior

Examples:

- Referral tracking that ties to actual incentives
- Service issues that alert leadership automatically
- Sales activities that are reviewed weekly by managers

Implementation Success Comes from Winning Hearts and Minds

There's no formula that guarantees adoption but there is one that guarantees failure: Build a system people didn't ask for, fill it with information they don't need, and expect them to use it without showing them how it helps. Working with a team of influential employees who can lend their guidance to implementation, roll out, and usage will help you obtain better results in the short and long run.

Focusing on winning them over:

- Highlight what's in it for them (time savings, better tracking, less double work)
- Reinforce early wins in staff meetings or newsletters
- Recognize and reward CRM usage as part of performance, not just process
- Focus on customer or member experience and their involvement

An inclusive process is more advantageous than a stealth ninja team working to quickly roll out your solution.

Don’t Skip Training — Build It Into the Culture

Training development starts in this phase. Trainers need to be in the loop and actively engaged so when you’re ready to go live, training is ready to support. Many CRM rollouts fail because training happens late in this process, creating a decline in momentum and excitement. Or worse, training never happen, it’s assumed.

Successful training focuses on expectations and system usage.

1

Deliver Role-Specific Training, Not One-Size-Fits-All

Different teams use CRM in different ways. Customize training content to align with actual workflows for retail staff, contact center reps, lenders, and managers.

2

Use Live Scenarios and Real Accounts in Training

Skip the dummy data. Use actual customer or member records, team pipelines, and service issues to show how CRM should be used day-to-day. This turns theory into muscle memory and gives trainers a chance to clean up bad habits early.

3

Train Managers to Coach, Not Just Use

Managers are the real levers of long-term CRM success. Train them not just to use CRM themselves, but to run usage reports, lead data-driven 1:1s, give feedback on CRM hygiene, and recognize usage wins in meetings.

4

Create an Internal CRM Champions Network

Identify 1–2 CRM “go-to” users per department who are comfortable in the system and can help peers. Give them early access to new features, let them provide candid feedback to leadership, and equip them to answer daily questions before people escalate to IT.

Where Training Fits into Accountability

Your CRM training program should support and strengthen your accountability efforts. When people know how to succeed and see that the organization is committed to helping them they're more likely to own their outcomes.

Reinforce CRM training through:

- Performance coaching in 1:1s
- Follow-ups on issues or missed entries
- Feedback loops that ask users what's working, what's not, and what they need

It's not just instruction, it's enablement and ownership. CRM is not extra, it's essential.

Implementation Checklist: Are You Building It Right?

Use these questions to stay focused on what matters:

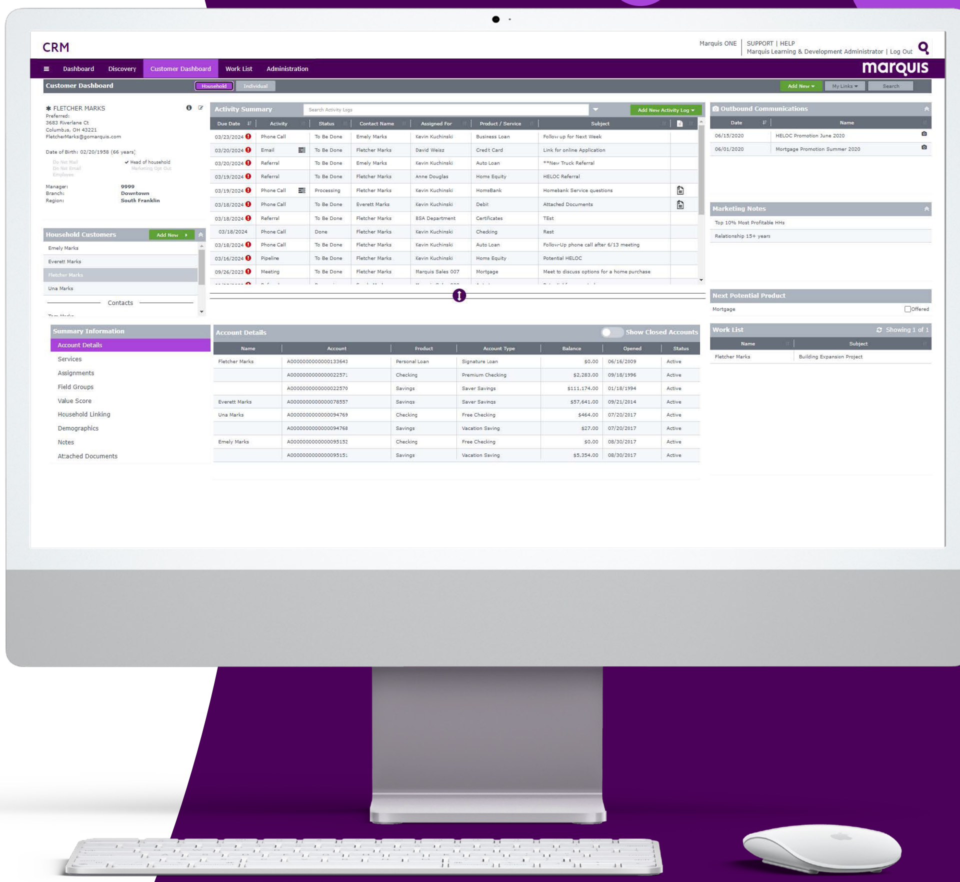
- Have end users seen the system and given feedback before go-live?
- Have you tested workflows in real use cases, not just in theory?
- Are you tracking the minimum set of data that still gives value?
- Do team leads know how to coach to CRM usage?
- Are reports and dashboards aligned with actual decisions or accountability reviews?

What Success Looks Like at the End of "IMPLEMENT"

By the time you finish this phase, you should have:

- A system designed around real user roles and responsibilities
- Clear, minimal workflows tied to strategic priorities
- Clean, usable data that supports action—not just storage
- Early champions who trust the system and help drive adoption
- Leaders trained to use CRM in their conversations, not just their reports

This phase isn't just about building CRM, it's about building belief and buy-in.



IV. ACT

Make It Actionable and Accountable

This is where the real work begins.

CRM Only Works If People Use It. And Keep Using It.

The best-planned, best-built CRM in the world means nothing if it isn't used consistently, visibly, and meaningfully. And that doesn't happen automatically.

After launch, most institutions see a brief spike in activity. Curiosity is high, teams poke around, reports are reviewed, but unless CRM is deliberately woven into the rhythm of the organization, usage drops off and value disappears.

CRM TRUTH

CRM isn't a software launch. It's a leadership habit.

FROM LAUNCH TO LIFTOFF

You're on the Clock

This phase is about making CRM part of the way your FI works, not just a system you installed. That means shifting focus to:

- **Reinforcing usage** through coaching, visibility, and reward
- **Reviewing data and activity** in meetings, reports, and dashboards
- **Holding people accountable** to consistent usage
- **Continuously improving** based on user feedback and new needs

When you begin to rollout your CRM you're officially on the clock. You're either building your CRM culture, or you're killing it. Great care needs to taken to ensure every day and every conversation is reinforcing the value of the CRM. Habits take time to form, and they require constant nurturing, feedback, encouragement, and sometimes a kick in the butt. "Inspect what you expect" is never truer then when you're rolling out your CRM.

Leadership Must Step Forward

Once the system is live, leadership's role evolves from the earlier stages of your CRM journey. It becomes more critical to long-term success.

Leaders must:

- Reference CRM in team meetings and 1:1s
- Use CRM data to ask questions, guide decisions, and recognize wins
- Demonstrate that CRM is non-negotiable, not optional

CRM TRUTH

If your top performers or top leaders don't use CRM, no one else will take it seriously.

Leadership Tips

Leaders can easily incorporate CRM discussions and insights into their existing communication. Here are some helpful tips and reminders.

1

Schedule CRM Time Into Leadership Cadence

Add CRM dashboards and activity reports to your recurring meetings. Show the team that if it's not in the CRM, it didn't happen. This builds muscle memory and cultural relevance.

2

Recognize CRM Wins Publicly

Celebrate staff who log consistently, close referrals, or use the system creatively. Recognition doesn't have to be big, just consistent.

3

Hold "CRM Check-in" 1:1s Once a Month

Ask managers and team leads to review CRM with each direct report monthly. Not to audit, to coach. This reinforces CRM as the system of record and embeds usage into conversations.

4

Create and Communicate a 90-Day Post-Launch Plan

Lay out a roadmap for CRM growth after go-live. This shows you're not "done" at launch and gives staff confidence in a clear, manageable evolution.

5

Ask Better Questions Using CRM Data

Change the way you lead conversations by pulling from CRM insights. This models the behavior you want to see and helps your team see CRM as a tool for them, not just for leadership.

Make CRM Actionable

It's not enough to collect data. You must use it and make the connection between data and actionable insights and customer or member engagement. That means building CRM into operational reviews and coaching conversations.

Examples:

- Sales huddles start with pipeline review from CRM
- Weekly service meetings highlight open tickets or unresolved issues
- Leadership dashboards track key usage metrics by department
- Referral outcomes are reviewed and linked to recognition or incentives

CRM TRAP

The more you require, the less you'll get.

There's a strong temptation to collect all the data, and report all the results. The reality is that the more you ask your employees to add to the solution, the less they'll add because of the time requirements. Focus on critical, foundational needs that will create momentum and grow your business.

Accountability Isn't Punishment, It's Clarity

People want to succeed. But they need clear expectations and consistent follow-up to do that. Most CRM failures at this stage come from ambiguity, not resistance. CRM isn't just a data system. It's a coaching system if you use it that way.

And when employees see that CRM usage leads to recognition, clarity, and support, it becomes part of the culture.

Make it clear:

- What should be entered, how often, and by whom
- What gets measured, reviewed, and acted on
- What support exists to help people get it right

Accountability starts at the top, but front line leaders are the ones who really ensure the vision is carried out. These helpful tips can accelerate your momentum.

Accountability Tips

1

Weekly "CRM Usage Snapshot" Review

What to do: Assign each manager to run a basic weekly usage report for their team, such as logins, referrals created, tasks completed, pipeline updates, etc. This task should be easy, and accomplished quickly, but focuses on the engagement of their team so the manager can take ownership.

Why it matters: It sets a clear expectation that CRM activity isn't invisible. It doesn't require confrontation, just consistency. Managers can use this as a pulse check or even bring highlights to their next huddle.

2

"Field Check" Spot Audits with Purpose

What to do: Ask managers to select 1–2 customer or member records per team member weekly to review notes, next steps, and status. Then ask the employee about those customers in conversation. Doing a deeper dive on specific opportunities should be a coaching opportunity to support development and not a "gotcha" moment.

Why it matters: It reinforces that CRM data isn't just for reports, it's a reflection of real relationships. When managers reference it live, staff realize the quality of their entries matters.

3

Monthly 1:1 CRM Coaching Conversations

What to do: Have managers pick one CRM topic to focus on per month in their 1:1s, referral quality, pipeline hygiene, note clarity, and service follow up. Being a CRM expert takes time, coaching to usage and improvements in steps helps build success over time and limits frustrations with doing to much to soon and failing.

Why it matters: Accountability becomes personal, practical, and supportive. Instead of "you didn't log it," the conversation becomes "how can I help you get better results using CRM?"

Sustain Momentum with Structure

Here's how winning institutions keep CRM adoption alive:

Regular Checkpoints

Monthly reviews with a rotating CRM topic (e.g., referrals, pipeline, service tickets)

Themed Campaigns

Quarterly focus areas (e.g., "Know Your Book," "Referral Reset," "Reclaim the Pipeline")

Recognition and Rewards

Highlight CRM wins in internal comms, team meetings, and even performance reviews

Feedback Loops

Gather and act on user feedback regularly to refine the experience

What Success Looks Like at the End of "ACT"

You'll know you've embedded CRM into your culture when:

- Leadership uses CRM in every performance conversation
- Teams see CRM as a tool for their success, not just management's
- Key reports and dashboards drive real-time decisions
- Usage isn't a push, it's a habit

When your CRM is working well, your employees see value in usage. More importantly, this will positively impact your customer or member experience, helping drive growth and loyalty.

V. WRAP UP

From Stuck to Strategic

CRM is leadership tied to your culture

You've now walked through the full CRM journey— Plan, Implement, Act—with one goal in mind: to move from stuck to strategic. Whether you're buying your first CRM or replacing one that failed to meet expectations, your success will be shaped by:

- How well your senior leaders set the tone
- How effectively your technology and project teams align the system to real needs
- How confidently your sales and service staff embrace it as a tool to help them succeed

The best CRM solution is the one your people use, trust, and build into the rhythm of your institution's culture because they see it as essential to reaching shared goals.

Let's Revisit the Hard Truths That Matter Most

- CRM amplifies your culture, it doesn't replace it.
- If leaders, both in title and perception, don't use it, neither will their teams or peers.
- Start small, win fast, and grow intentionally.
- Accountability is clarity, not control.

Your Next Step Isn't Technical, It's Cultural

The hardest part of CRM isn't logging in. It's showing up with intention. It's choosing clarity over convenience. Leadership over delegation. Focus over features.

If you do that?

Your CRM will stop feeling like a tool you're "trying to get people to use" and start becoming a platform your teams rely on to serve, sell, and succeed.

That's the shift. That's the strategy. That's how you get unstuck.

MARQUIS CRM

Built Specifically for Financial Institutions

Drive deeper, more meaningful relationships, improve efficiency, and increase sales with Marquis CRM.

Make it personal

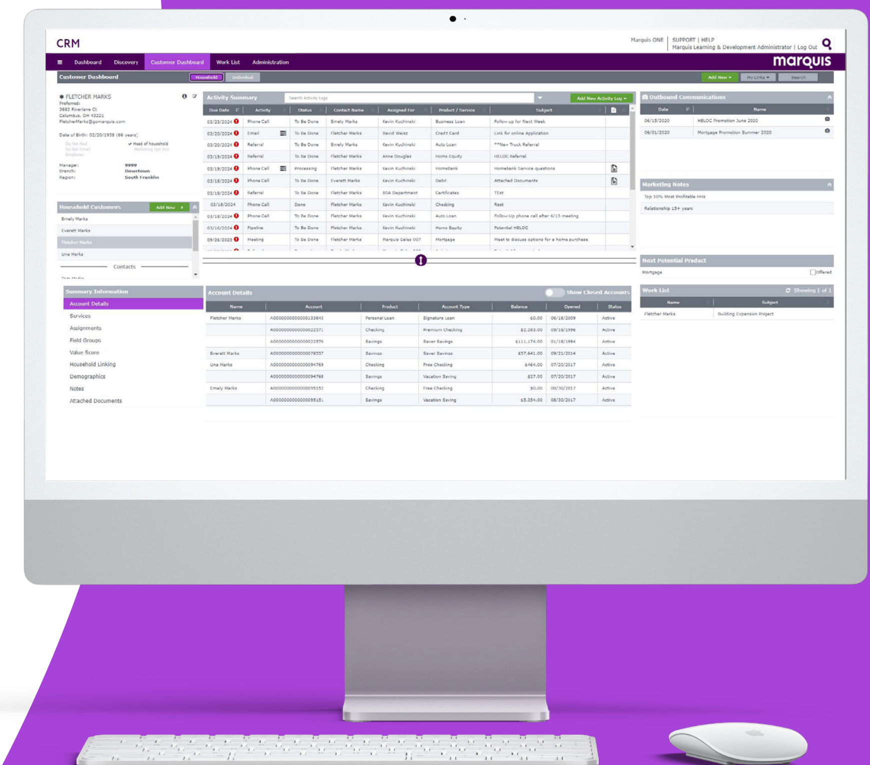
Capture valuable interactions across all channels and share an integrated view with your front line.

Make it easy

Automate service, sales, and operational workflows while calculating and tracking incentives to manage pipelines and referrals.

Make it count

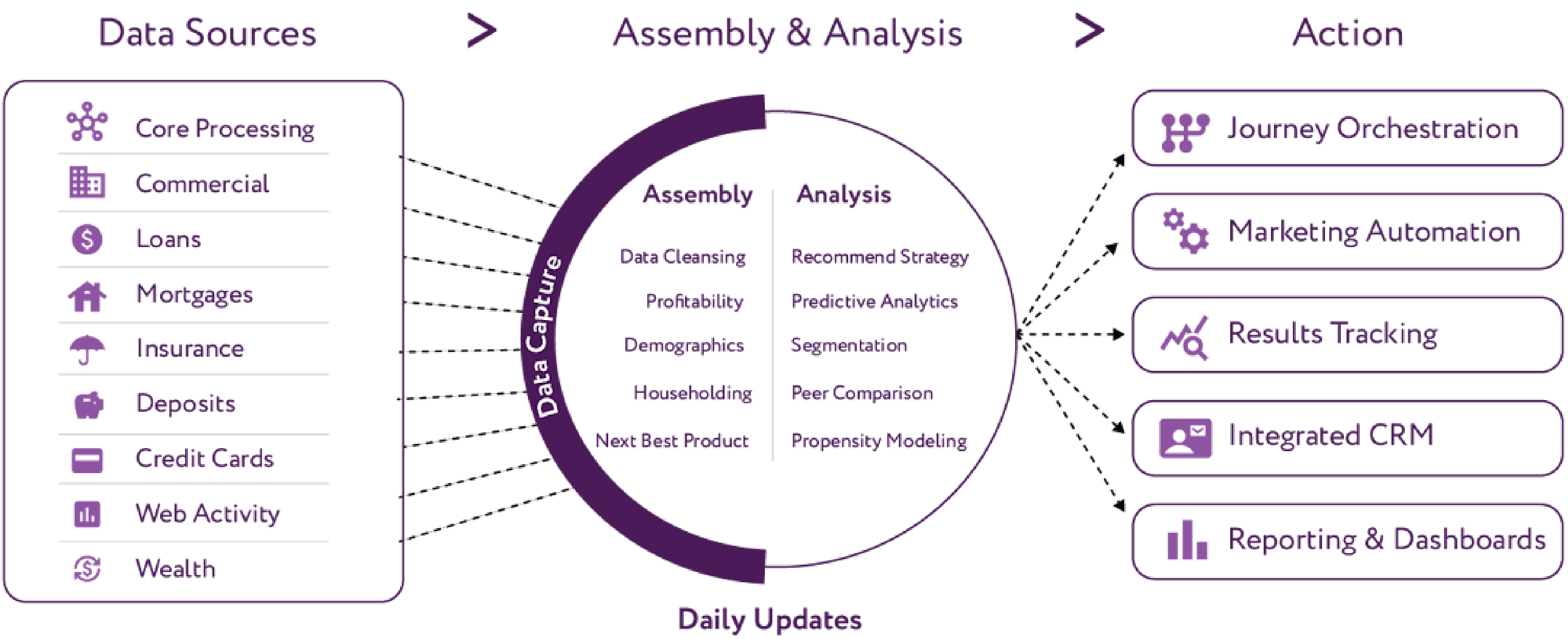
Leverage the next best product and sales scripts to create targeted follow-up lists for staff, making it easy to send, receive, and track referrals.



Marquis Data-Driven Marketing Suite

Marquis offers a complete suite of marketing solutions that help banks and credit unions turn raw data into actionable insights. With Marquis, financial institutions can uncover new opportunities, personalize outreach, and deliver the right message to the right account holders at the right time. From promoting small, consistent savings habits to deepening relationships and becoming the primary financial institution, Marquis drives measurable growth and lasting loyalty.

- Centralize all consumer data in one place
- Identify marketing opportunities critical to driving revenue
- Automate personalized, timely, multi-channel campaigns



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