

## CASE STUDY

# Financial Institution's Multi-Wave Household Acquisition Campaign Results in 340% ROMI

### Challenge

A 19-branch Southeastern financial institution serving more than 120,000 account holders with assets of \$1.4 billion sought to obtain new checking households and improve the value of accounts through the use of customized, targeted direct mail.

### Solution

Seeking a practical and long-term solution, the financial institution chose Harland Clarke's household acquisition solution, Acquisition Accelerator®, for its proven track record of delivering impressive results, sustained development, and exceptional return on marketing investment (ROMI).

To fulfill the financial institution's desire for sustainability, Harland Clarke chose a multi-wave campaign strategy that extended personalized offers to account holders and prospects in close proximity of its service area.

**\$86 million**  
total balances acquired

**\$1.5 million** NET  
estimated contribution

**340% ROMI**

Leveraging the financial institution's commitment to providing quality products and services, Harland Clarke used advanced analytics and strategic creative messaging to deliver targeted, high-value incentives designed to motivate prospects to switch financial institutions and increase account holders' wallet share.

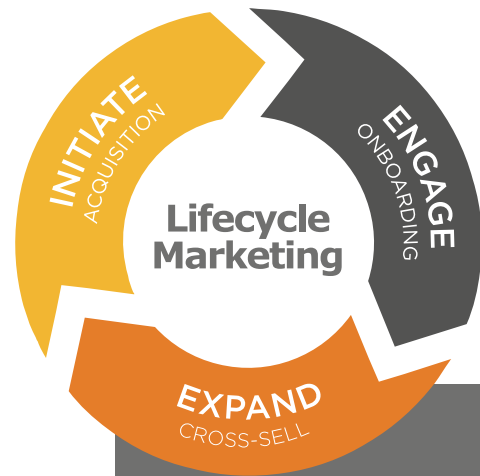
### Results

The year-long, seven-wave campaign to account holders and prospects was hugely successful for the financial institution, resulting in nearly \$86 million in total balances acquired, with a NET estimated contribution of almost \$1.5 million after all direct mail and incentive expenses — a 340 percent ROMI. All seven waves of the campaign rated favorable economically, with ROMIs rarely deviating. Five waves produced ROMIs of 300 percent or greater, with the highest reaching 400 percent.



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MARKETING SERVICES



*Many variables impact marketing campaign success. The information on earnings or percentage increases that is contained within this case study is provided for demonstrative purposes only. Harland Clarke does not guarantee or warrant earnings or a particular level of success with a campaign.*

*Harland Clarke's Lifecycle Marketing Solutions — powered by advanced analytics, insightful data and award-winning creative designs — drive engagement and profitability at every stage of the account holder relationship.*

*Through effective acquisition, onboarding and cross-selling strategies, we help our clients achieve primary financial institution status with their account holders.*

#### **Acquisition**

Reach prospects with targeted, effective communications that encourage new account openings and set the foundation for strong relationships

#### **Onboarding**

Use relevant account holder data to deploy multichannel communications that effectively transition new account holders into satisfied, loyal customers

#### **Cross-sell**

Increase the number of household products to capture full profit potential

To learn more about Harland Clarke can help your financial institution **generate new households** and **increase the wallet share of current account holders**,  
call **1.800.351.3843**,  
email us at **contactHC@harlandclarke.com**  
or visit **harlandclarke.com/AcquisitionAccelerator**.