



Marketing Solutions

Data Analytics - MCIF CRM Digital Platform Direct Marketing Services

EXECUTRAX CALLTRAX DOCUMATIX ONTRAX ExecuTrax, Marquis' MCIF program, assembles information CallTrax is a CRM solution built on the ExecuTrax DocuMatix is a complete digital communications Clients who may not have the resources, time or from a financial institution's many data sources into one database and designed exclusively to help financial platform for email and SMS messaging with built-in interest in managing a database marketing tool enlist marketing automation tools and business intelligence database where it can be analyzed and used for business institutions manage and monitor their formal sales OnTrax consultants to run ExecuTrax. OnTrax is a dashboards updated in real time. DocuMatix is professional service that provides expert guidance to and marketing decisions. As the cornerstone of the and service initiatives. Marquis marketing product suite, ExecuTrax integrates included with ExecuTrax, CallTrax and OnTrax. drive strategic and tactical marketing efforts, as well as seamlessly with other Marquis solutions. ExecuTrax can tracking campaign results. monitor customer/member activity and events daily and automatically trigger a marketing message. Includes: Marquis **NEXT** Dashboards and Reporting Pairs well with... Pairs well with... Pairs well with... Pairs well with... DocuMatix DocuMatix Direct Marketina Direct **WEBTRAX** COMMLINK COMMLINK **WEBTRAX WEBTRAX DOD Print** COMMLINK **WEBTRAX COMMLINK** Demographics Professiona **DOD Print** Professional Demographics **DocuMatix** Marquis NEXT Dashboards and Reporting Professional

DocuMatix Professional Services

Marquis experts advise and set up decision trees to automate email and text messages.

WEBTRAX

WebTrax gives you the ability to identify your website visitors' shopping for specific products and automatically communicate with them via email or print. You can leverage your website to directly respond and serve your clients.

Marquis **NEXT**Dashboards and Reporting

More than 80 customizable reports are available with snapshots and graphs, providing easy access for executives.

COMMLINK[™]

Your frontline team gains direct access to all client communications as they happen. CommLink keeps the power of automated marketing relevant with real-time updates. Never again will your frontline team be in the dark about client communications.

Demographics

Demographics help to better understand the customer/ member to create relevant offers with information such as homeownership, presence of children, number of cars and more.

Direct Marketing

Personalized direct mail and email marketing delivered to clients daily. Marquis has the ability to create the strategy, write all copy, design print and digital pieces, send emails and direct mail and track results.

DOD Print

Clients have the ability to send personalized direct mail pieces in addition to emails from the DocuMatix platform.

Marquis Software Features Coming Soon

CALLTRAX NEXT DOCUMATIX EXECUTRAX NEXT 360 View of Client Relationships **Robust Reporting and Dashboards Two-Way Texting** Redesigned and updated MCIF utilizing Marquis NEXT: Dashboards and Reporting. Provides a quick, single source of important customer/member details. Updating our DocuMatix Digital Platform to include two-way texting functionality, **Daily Data Refresh Performance** providing a better way to reach the millennial demographic and the growing population that Improved processing time for daily data refreshing. An improved user experience, allowing customization based on role-specific view and access settings. More Contacts, Addresses and Email Addresses Available **Marguis Next: Dashboards and Reporting** prefers to be reached by text. "Widgets" displaying pertinent data based on each individual user's role or needs. Provides customizable CRM-specific reporting. Leveraging multiple contacts tied to an account to accommodate for multiple signers on an **Mobile Emails Enhancements** account. Ability to have multiple addresses and email addresses for each individual with Easier editing and viewing of mobile-ready expanded name/address conditioning. **Activity Log Customization** emails. **Both Individual and Household Tracking** Allows for inclusion of your own custom definable fields within each activity log. **Custom Exports** Individual level integration that is incorporated into household level instead of a separate **Customized Workflows and Pipeline Types** As well as continuing enhancements to processing level for a better overall relationship view and expanded individual marketing. Allows the creation of workflows to accommodate individual role or departmental processes. Enables WebTrax, adding Custom Exports to allow **Campaign Management** the creation and assignment of multiple, flexible, role-specific pipelines. users to export data and customize output Improved campaign management with better account level tracking. formats to fit their needs. **Expanded Incentive Program Multi-Browser Support** Includes improved calculation logic, incentives creation and production tracking. All this functionality available in an easy-to-use web-based application and accessible from a variety of browsers. The creation of activity logs within CallTrax NEXT directly from your Outlook inbox.