

Market Wiz®

The complete MCIF that puts vital customer and prospect information at your fingertips.

Many community-based financial institutions don't have a data warehouse; in fact, many aren't convinced they even need one, much less that they could afford one. Most institutions would agree, however, that what they do need is the ability to research their customer relationships using the vast amount of customer data available.

With Market Wiz, you can easily get the information you need when you need it—without extensive training or IT involvement. Market Wiz uses mapping and data mining technologies to generate and measure highly targeted marketing campaigns. Its user-friendly interface makes its powerful reports and queries available to users of all skill levels. This affordable and easy to use MCIF solution ensures that your programs reach the right people with the right message.

"I have found Market Wiz to be effective in generating very useful marketing information. The campaign management tool is intuitive and easy to use. The product has easily met our expectations and the high quality of staff support is a real key to our success."

Jessica L. Cortese

Marketing Research Coordinator
Hudson Savings Bank

Market Wiz is a complete MCIF system that:

- Performs householding of account level information
- Executes profitability analysis for your accounts and households
- Appends household demographic information not necessarily available within FI systems

Do You Need an Easier Way to...?

- Profile both customers and non-customers
- Analyze the competition
- Identify new markets
- Identify cross selling opportunities
- Target desirable prospects
- Perform profitability analysis of your institution's accounts, products, and households
- Conduct a branch site analysis

In addition to providing these functions, Market Wiz also provides 200+ standard reports, embedded mapping, and a query tool that requires no more than basic PC knowledge to use. Market Wiz also provides information on non-customers and competition.

With Market Wiz, you will realize a quantifiable return on marketing dollars. Market Wiz users are able to measure results and demonstrate that the money allocated to marketing campaigns is an investment rather than an expense.

Decision-Support for Marketing — IT Personnel not Required

Driven by the needs of financial marketing professionals, Market Wiz is:

Intuitive. If you use a computer, you'll be able to use it right out of the box. No extensive training sessions, no special classes, no need for complicated IT setup or ongoing involvement.

Powerful. It provides a wealth of information about your customers, your prospects, and your market area.

Versatile. You can perform research on everything from potential branch expansion to competition within your marketplace. Embedded mapping enables you to see a visual representation of your customers, prospects, branches, and competitors on customized maps.

Fast. With a few keystrokes it can generate mailing lists, perform research on customers or prospects, run profitability analyses, turn out a variety of management reports, and perform dozens of other marketing-related tasks in minutes, right at your own desk.

Cost effective. It is economical to acquire and maintain, as well as easy to use.

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MCIF+

Market Wiz provides Embedded Mapping and Prospect Data to significantly enhance your institution's ability to process and use customer information quickly and productively — with savings that drop directly to your bottom line.

Embedded Mapping

There is no need to export your customer information to external applications. You can display your customers and prospects on a map with the click of a button. Maps are customized to your institution so that you can determine which customer and prospects live close to your branches.

Prospect Data

Market Wiz provides the ability to research your prospective customers. There is no need to invest in or train on additional modules. Purchasing costly add-ons is not required.

Market Wiz Covers All the Basics, Too

Perform Research on Multiple Levels

- Identify households or accounts that meet specified criteria
- View summaries based on total deposits, total loans, profitability, and/or branch assignment of identified households
- Segment customers based on current relationships
- Develop highly targeted promotions for households
- Create mailing lists for targeted promotions
- Easily export data to familiar tools

Results with the Click of a Button

- View data on specific customers either in reports, maps, or graphs
- View summary information in over 200 standard reports
- Create lists for mail merge, telemarketing, and export to mail house
- Produce reports without specially trained, dedicated operators

Turnkey Approach – Easy to Implement

- Eliminate the need for additional software and training
- No need to modify interface when your data changes
- Included prospect file automatically excludes existing customers
- Prospect data is enhanced with the same demographics as customer data

Assign and Research Customer Profitability

- Profit values are assigned to each account and household relationship
- Transaction data is included in calculating account value

Use Mapping to Analyze Market Areas

- View market areas based on customized drive times from branches
- Call up all residential and business households within your market area
- Create new market areas for proposed site analysis
- View customers or prospects on customizable maps with the click of a button

