

# Acquiring the Most Attractive Small Business Customers



### ***The Business***

*Mid size regional bank with over 30 branches in the Southwest.*

This bank was acquiring local smaller banks, so it could offer its expanded services to the most attractive small business prospects within a certain radius around each branch. “Attractive small business” was defined as high growth, deposit rich companies.

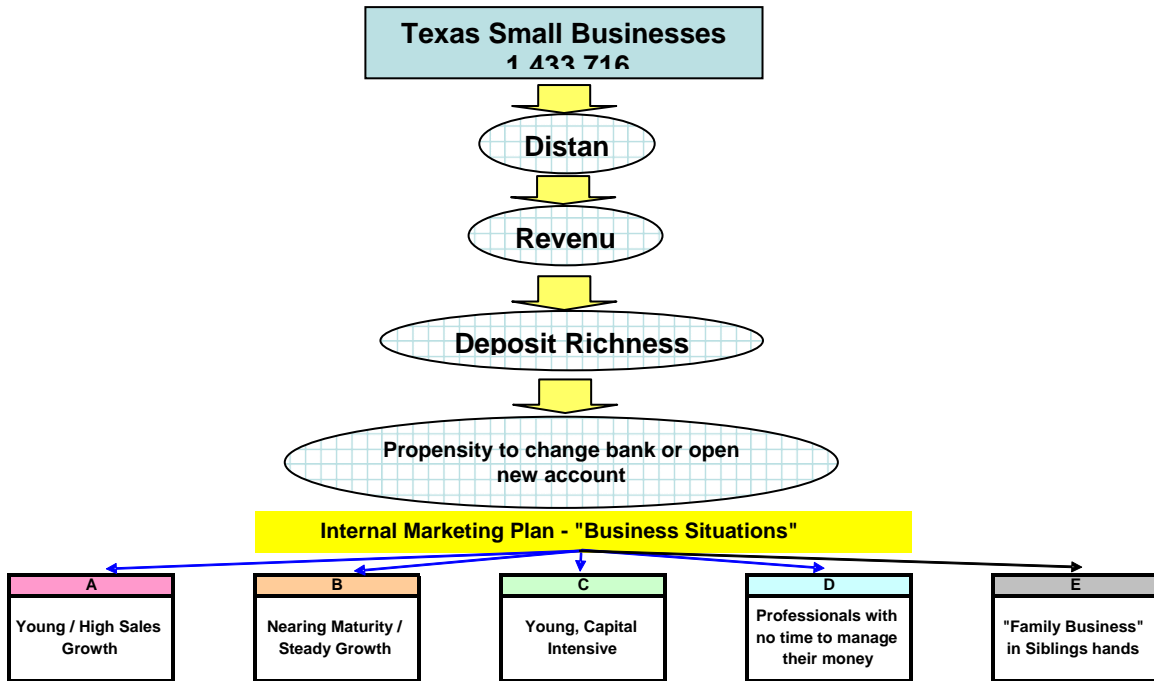
### ***The Challenges***

- Available data on small businesses is “thin”, at best, and little is available that quantify rates of business growth over time.
- It is difficult to link business owner personal profiles to businesses, even though banking decisions are made on a small business owner’s profile, versus the business.
- Marketing programs executed by branch personnel typically fail due to on-going shifts in the branches marketing priorities.

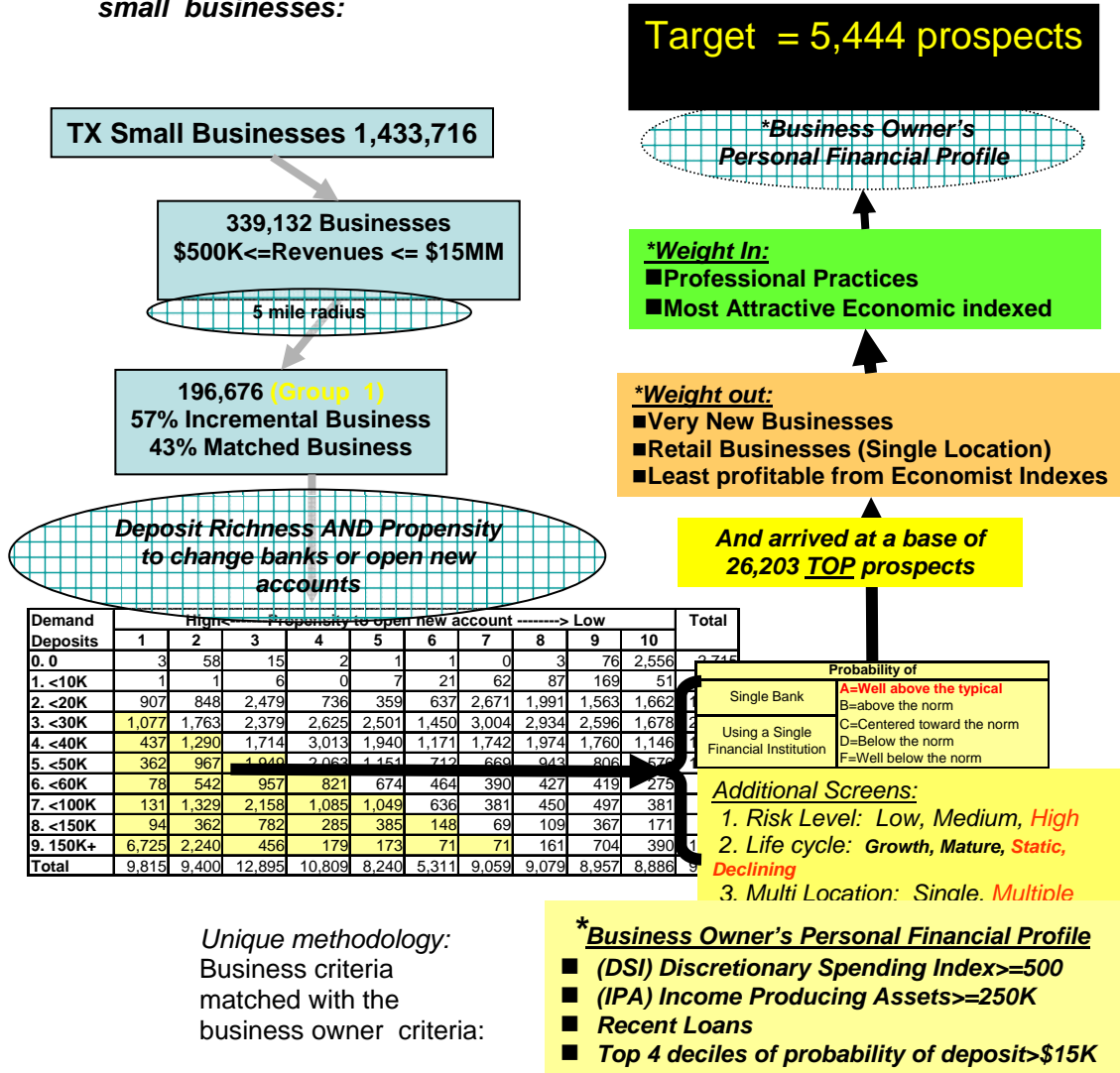
### ***Intellidyn’s Solution***

- Instead of building the largest base of prospects, very small target groups were identified and delivered, each in segments by their business situation/need.
- An internal marketing program was directed to the bankers, to enable them to understand:
  - The sophistication of the segmented targeting that was done on their behalf and,
  - How to interpret the descriptions of the prospects business situation/need.

***Method applied to narrow down the target list:***



**Sophisticated screening and selection criteria used to identify attractive small businesses:**



**Client Results:**

- Highest quality lead rate program in history
- Continuous feed of targeted prospects to bankers
- Recognition from prospects and clients that "The banker took the time to "Know Me"