

## Case Study: *Inbound & Outbound Consumer Customer Acquisition*

# Fortune 100 Pre-eminent Financial Services Company

### Objectives

- Sell existing mortgage customers additional products and services
- Build relationships with existing customer base for marketing, education and sales efforts

### Solution

- Extensive product training – Developed 'Mortgage Certified' training program - Design secure technology solutions
- Educate and sell consumers on products and services available to them
- Build program to close deals – Consummate transactions

### Results

- Consistently exceeded client measured quality metric of 92%
- 40,000 new customers acquired
- 4:1 ROI on new customer revenue



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