

## Essential solutions for community banks and credit unions.

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### **A Community Bank in the Southeast uses Market Intelligence's Commercial Prospecting Tool to Help Lenders' Sales Efforts**

A southeast community bank with less than \$10 billion in total assets partnered with Market Intelligence in 2017 and developed a management system for its commercial lenders that empowers them with a strong sense of accountability and agency. The bank has also integrated the Market Intelligence Commercial Prospecting solution into its sales management process.

To target missed opportunities and increase the productivity of its 65-person lending team, this southeast community bank found creative ways to utilize its customer relationship management (CRM) software.

The bank uses the Market Intelligence Commercial Prospecting solution to generate leads, and then uploads the leads to its CRM. The bank flags any leads from Commercial Prospecting with a special identifier. This helps the bank track its prospecting efforts and minimize redundancy when following up on leads.

The lenders save time by using the bank's sales management team to generate lead lists, either through Commercial Prospecting or market research. This allows the lenders to spend the majority of their time at community events or forging relationships.

The sales management team has a quarterly sales incentive process that fosters collaboration between the teams and provides lenders with support to achieve their sales goals. The management team also sends a quarterly, company-wide list that ranks lenders by their performance. The list serves to boost peer competition and accountability. Bank management has regular meetings with its lending teams to discuss performance and troubleshoot issues.

The bank primarily uses the Market Intelligence Commercial Prospecting tool to spot refinance opportunities when commercial mortgages are approaching maturity, or identify potential customers looking for new service.

**Key Benefits:** With the help of technology enabled lead generation and strong management — the bank has steadily grown its commercial & industrial and commercial real estate lending portfolio year over year.

Do you want to leverage customer data to drive better decisions? If so, please contact S&P Global Market Intelligence today at +1 877 863 1306 or visit: [spglobal.com/marketintelligence](http://spglobal.com/marketintelligence)

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