Case Study

FinGoal + navanta

Mauch Chunk Trust Company

NEIGHBORS YOU KNOW, BANKERS YOU TRUST.®

Key metrics across the HELOC campaign

3.5%
appointment rate

50%
conversion rate per appointment

> FinGoal allows us to better understand our customers and where they are on their financial journey so we can engage them with the right offer at the right time.

Marty McGuire, SVP of Marketing at Mauch Chunk Trust Company

BACKGROUND

Mauch Chunk Bank & Trust partnered with FinGoal and Navanta to leverage their pre-built integration to enhance its marketing capabilities with personalized offers. The goal was to leverage FinGoal's transaction data insights and Navanta CRM platform to proactively reach out to customers about products they may need and ultimately increase conversion rates.

IMPLEMENTATION OF FINGOAL TAGS

Mauch Chunk uses FinGoal tags inside of the Navanta CRM in many facets of their bank, including in branch with account managers seeing tags when meeting with customers, to use for calling campaigns as well as email and postcard mailings.

HELOC CAMPAIGN

One of the initial of campaigns run by Mauch Chunk was an effort to drive new HELOCs. They ran a highly targeted calling and postcard campaign to existing customers with the FinGoal Tag 'Mortgage Payment', (indicating they have a mortgage at an external FI) along with 'Multiple Credit Cards' (indicating possible high debt spending).

By targeting homeowners and credit card holders with a focused HELOC campaign, the bank achieved a 3.5% appointment rate and nearly a 50% HELOC application conversion per appointment. In addition to the uptick of HELOCs, cross-sell efforts generated additional product opportunities across wealth management, mortgages, CDs, and account services. Nearly every appointment resulted in a tangible outcome, demonstrating both the direct financial impact and the broader relationship-building value of the campaign.