

# WEST COAST BANKER'S BANK

Solving the complicated marketing for SaaS Risk-Based Loan Pricing Model. Simplifying it for sales to help one of the largest Banker's Banks on the West Coast be successful.

## CASE STUDY



### AT A GLANCE:

#### Challenges

- The model was complicated and difficult to explain to users
- Users felt threatened by its existence - they didn't want to appear to be less important in the underwriting process
- There were not dedicated resources or support from the Modeling Team
- Lack of communication

#### Benefits

- Four-fold increase in sales over 3 years
- 200% increase in customer retention

### THE CHALLENGE

In this case study, we examine the implementation and marketing of a Risk Baked Loan Pricing Model for a Banker's Bank on the West Coast.

They faced a unique hurdle in marketing their Risk-Based Loan Pricing Model – a rather difficult product explain leaving their sales team scratching their heads when it came to introducing and implementing it with clients.

Intrinsically tied to the success of their highly profitable interest rate swaps business, this model needed traction that the bank was not able to achieve on its own. Let's explore the journey they undertook to tackle this challenge head-on.

### THE APPROACH

Enter Kim Jackson, Fractional CMO. With 20 years of capital markets experience, Kim took the lead over a combined sales, marketing, and development teams.

By taking a holistic approach to managing the business, Kim aligned these crucial teams to work towards a common goal - improving profitability and supporting the closely aligned interest rate swaps desk.

With the teams now centralized they created straightforward marketing materials and pre-recorded instruction videos, making it easier for users to get the hang of the model.

To ensure our clients felt supported every step of the way, Kim introduced a training position. Clients could reach out anytime for user onboarding or to keep their knowledge up to date.

They decided to pivot their messaging about the model, highlighting it as a valuable tool – just one more arrow in a loan officer's quiver, not a threat. In order to create buy-in from the users, Kim also encouraged the subscribing banks to add their own bank's loss data, therefore convincing subscribers even more regarding the validity of the model.

As their sales journey progressed, they assigned a product specialist to tag along with our sales champions in their meetings, ensuring they had all the backup they needed.

To keep things running smoothly, they set up weekly meetings involving the product, sales, and development teams. This helped them refine the model's user experience and iron out any wrinkles.

To maintain the momentum, they established official communication channels and collaboration with the interest rate swaps desk. Identifying problems early on became seamless, benefiting both potential and current Loan Pricing Model customers.

Kim's strategic leadership brought harmony to our sales, marketing, and development teams, aligning their efforts to not only boost business profitability but also fortify the success of our interest rate swaps desk.

## THE SOLUTION - LEADERSHIP

The results speak volumes: The Risk-Based Loan Pricing Model experienced an astounding four-fold increase in sales within just three years, coupled with a remarkable 200% boost in customer retention.

This remarkable success is a testament to the undeniable impact of a meticulously executed strategic plan on the bottom line.

In closing, this case study serves as a shining example of the transformative potential unlocked by the appointment of a fractional Chief Marketing Officer (CMO).

With the seasoned expertise of [Kim Jackson](#), boasting over two decades of experience in capital markets, the company orchestrated a remarkable turnaround.



## KIM JACKSON CMO

A senior strategic marketing executive with an exceptional track record spanning over two decades, Kim has in-depth experience in both the financial and marketing sectors, with a special emphasis in AI.

She is also a current member of the American Bankers Association.

**Learn how Kim can help your business:**

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[Book a call today](#)