

## Custom Pen Promotes Brand, Drives Branch Traffic for Large Retail Bank

### Client

Large Regional Bank

### Market

Financial Services:  
Retail Bank

### Solution

Branded Merchandise:  
Writing Instruments

### Services

Product Ideation, Sourcing,  
Fulfillment and Distribution

### Benefits

- Improved customer satisfaction
- Enhanced cross-sell opportunities
- Increased brand awareness
- Efficient fulfillment and distribution

### SITUATION

A large regional bank holding company with more than a million customers recently embarked on a major rebranding effort, which included updating its branches with new signage, improved lighting and remodeled entryways. Millions of dollars were spent to create an enhanced customer experience as part of a larger strategy to expand market share. About 70% of the bank's customers visit one of its branches at least monthly, so they wanted to provide a pen that clients could take with them. By eliminating the old fashioned pens chained to desks, the bank sought to encourage promotion of its brand outside the branch and demonstrate trust in its customers.

### SOLUTION

WorkflowOne has been a supplier to this regional bank for many years, providing a variety of print, promotional and marketing programs used by its large employee base. The bank's Corporate Marketing department came to WorkflowOne to source the perfect pen for its new brand image.

Although the bank had not yet finalized its new branding strategy, the WorkflowOne team recommended a customized ink pen that would be unique and easily recognizable. WorkflowOne started the ideation process by providing over 200 pen samples for review. It was very important that any pen chosen could meet the bank's new rebranding guidelines for logo placement, fonts and colors. The final recommendation went through an elaborate approval process that included sign-off by the bank's CEO.

Once the design was approved, an initial order was placed for 500,000 pens. Based on experience, WorkflowOne was concerned that this quantity was too small and had its vendor on notice that another order could be coming soon. The initial order was gone within a week and the bank placed a subsequent order for 2 million pens. By leveraging WorkflowOne's purchasing power and global sourcing capabilities, the bank was able to secure this quantity at the lowest cost possible.

Since the custom pen is manufactured specifically for the bank, lead times can be lengthy. But by constantly monitoring orders and usage reports, WorkflowOne is able to keep a supply available at all times. In less than one year, WorkflowOne has sourced 4.5 million pens on behalf of the bank.

In order to maintain consistency of its brand image, the bank has mandated that this pen be the only branded merchandise given to customers. It has even gone so far as to eliminate other logoed items in its company store.

Upon successful completion of the initial brand launch, pens are now being stored in WorkflowOne's warehouses where branches can easily order them through an online portal. WorkflowOne even recommended optimal packaging to reduce the number of reorders, thus controlling shipping costs while ensuring branches always have a supply of pens on hand.

*"These pens have long lasting, smooth ink flow, truly the best writing instruments we have ever used."*



*WorkflowOne is a supplier to hundreds of financial companies throughout the United States.*

## **BENEFITS**

A custom pen has proven to be a cost-effective way for this large regional bank to promote its new brand identity and provide something of value to every customer who walks into a branch. To date, nearly 3 million pens have been distributed, which equates to 30 million new brand impressions presented in the bank's key markets. Throughout restaurants and retail establishments in the bank's key markets, servers and clerks can be seen using the bank's pen and providing it to their customers to sign invoices and charge slips. The pens have even been featured on television commercials promoting the bank's new image.

The high quality pens have proven to be very popular with customers, who are returning to bank branches more frequently to pick up additional supplies, which opens the door for more cross-selling opportunities by the bank.

## **CONTACT US TODAY**

To learn more about how WorkflowOne can generate results for your organization, contact your local representative or visit our website: [workflowone.com](http://workflowone.com)

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