

Case Study

LIFE INSURANCE COMPANY TAPS ZETA'S "INTEREST SEGMENTATION PROGRAM" TO **ACHIEVE DOUBLE DIGIT INCREASES**

One of the biggest Life Insurance Companies in the US realized it needed a customized solution for its vast number of clients. With several planning options, they were in need of a way to gather personalized consumer preferences to customize their newsletter messaging and ultimately increase sales.

SITUATION:

- » Current campaigns have messaging targeting young and retired consumers equally
- » Developing content that can adjust and be updated per lifestyle changes

SOLUTION:

- » Craft newsletters based on personalized customer content
- » Create new consumer lead opportunities
- » Supply customers with customized information to increase sales

SUCCESS



when Interest Segmentation model was used.



for newsletters Interest Segmentation model was used.

METHODOLOGY

Zeta recommended an Interest Segmentation model to best determine user content preference based on web-click activity. It was designed to increase engagement and build long-term relationships. How so? By delivering targeted content based on preferences. Zeta designed this program to capture preferences via click-stream activity and customer demographics. Following this, a robust scoring model was created to integrate all customer interest activity and assigned the best matched interest every night. The scoring models were adjusted regularly based subscriber-selected preferences and web activity to keep content relevant to the consumer. Within 90 days, one-third of its customers were assigned to a group that received one of three personalized email newsletters using the Interest Segmentation model to include dynamic elements in the content :

- + Subject line
- + Hero image
- + Content-specific articles
- + Call-to-Action driving additional website views

The scoring model was equal to adding 33,000 new subscribers per month (or an additional 1.7 months of activity overall). The use of relevant dynamic content also connected consumers to specific brokers to get clients through the sales cycle faster.

ABOUT THE COMPANY

The Life Insurance Firm has been helping families and businesses achieve financial security for nearly 160 years. With \$238.5 billion in assets, \$27.9 billion in revenues, they provide financial security to more than 4.4 million people. They rank 100 on the 2016 FORTUNE 500, and were recognized by FORTUNE® as one of the “World’s Most Admired” life insurance companies in 2016.

See how Zeta CRM helps today’s marketers achieve their most critical goals.

Call 781-863-8117 to learn more, or visit us at zetaglobal.com.