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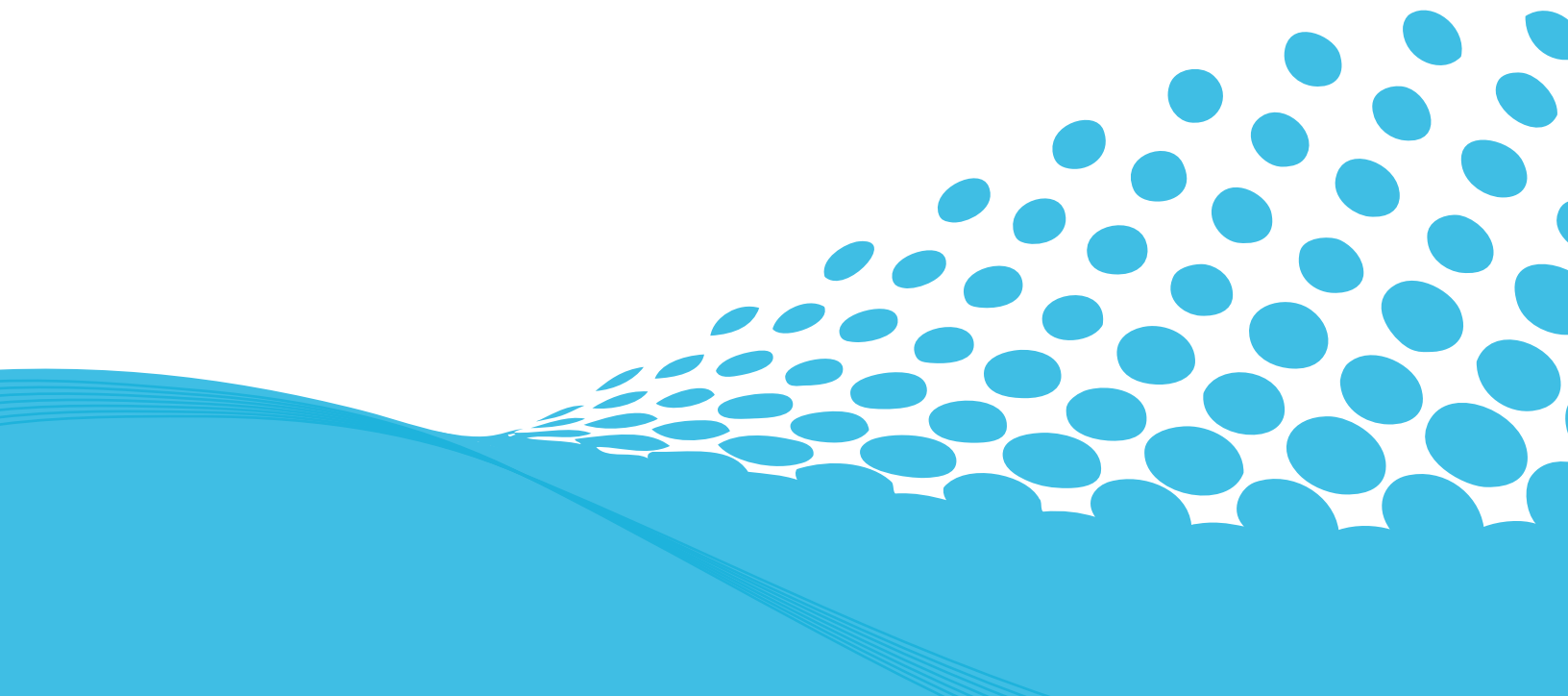
Multi-Channel Distributed Marketing Automation & Producer Enablement:

How Distribion Clients Measure Success

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When we say that the Distribion multi-channel distributed marketing automation solution has been proven to deliver measurable marketing communications improvement for insurance carriers, MGA's, and BGA's, we mean just that.

In 2011, a review of clients showed results like these:

25%   **Increase in Marketing Efficiencies**

15%   **Reduction in Compliance Costs**

10%   **Reduction in Support / Maintenance Costs**

10%   **Increase in Sales Conversions**

Of course, not all clients measure marketing communications success the same way. So we've collected some case studies that will show you how Distribion clients measure success.

Wondering why we aren't naming clients in each case study? Some of our largest clients consider Distribion such a competitive advantage that we can't name them.

Life, Personal & Commercial Carrier

When this company purchased our solution, they were facing three challenges:

- Aggregating customer & prospect data into an easy-to-use agent portal
- Managing multiple internal & external data sources
- Empowering agents to send localized, customized campaigns without jeopardizing brand or regulatory standards, and allowing corporate marketing to send personalized "on behalf of" campaigns

After an analysis of their marketing processes with our implementation team, the company opted for a proof-of-concept pilot through a Quick Start program. Soon, corporate marketing and field sales were able to leverage:

- Customizable, personalized multimedia email templates
- Single-click personalization for microsites and landing pages
- Centralized access and tracking for customized forms and surveys
- Real-time tracking and reporting across all channels and users

The rules-based user management, built-in brand and regulatory compliance, and near real-time visibility allowed them to track results in ways they never could before. The reporting and management tools combined with measurable ROI to make it an easy decision to transition to a full deployment with Distribion after the pilot program. ROI includes:

11% Increase in Qualified Leads

17% Increase in Agent Program Usage

25% Reduction in Ad Hoc Customization Requests

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Commercial B2B Carrier

Like an increasing number of carriers, this company relies on a network of channel partners to sell policies. So their major challenges were:
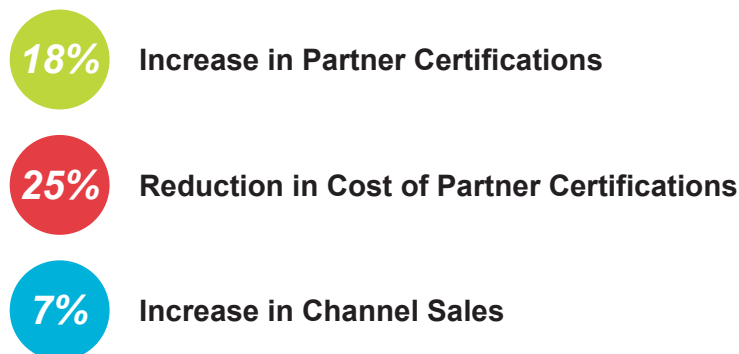
- Improving communications with channel partners (banks, credit unions)
- Increasing channel sell-through via certification & training

Given the challenges they faced, as well as existing investments in a digital asset management system and campaign management system, the company selected a managed services package to help them set up six solutions modules:

- Agent profile-driven local microsites and landing pages
- Anytime, anywhere, any device access to the sales portal via microsite
- Centralized access and tracking for customized forms and surveys
- On-demand training & certification testing through education & learning center
- Customizable, personalized email templates with multimedia capabilities
- Dynamic presentation generation and assembly

Once the branded online portal was up and running, the client is able to support their entire channel partner network with just two administrators, who keep the system running and delivering compliant marketing and sales assets to sales. Microsites and landing page tools are one of the most popular tools among the company's channel partners. "They love the ability to publish a customized, optimized landing page or complete microsite with just a few mouse clicks," the system administrator says.

In less than a year, the new centralized set-up has yielded outstanding results, including:

18%   **Increase in Partner Certifications**

25%   **Reduction in Cost of Partner Certifications**

7%   **Increase in Channel Sales**

Life & Annuity Carrier

This global brand faced challenges that are common to carriers with a large network of independent producers and agencies, including:

- Compliance with brand and regulatory standards
- Quick deployment of new materials, to get messages to prospects faster
- Educating & motivating the channel
- Delivering communications from the home office to MDs and agents / recruiting agents
- Facilitating agent-to-agent sharing and communication

This client determined during the initial assessment that it wanted to use the solution for internal communications and campaigns for which independent agents can opt-in to have corporate send on their behalf, and as a portal where independent agents can order printed materials and opt-in for campaigns. Just two administrators at corporate headquarters support thousands of agents and producers, so the ease-of-use and power of the system was a primary consideration in the purchase.

Now all of the company's agents and producers can opt-in for a range of corporate marketing offerings, including:

- Personalized, customizable email templates with real-time tracking & reporting
- Multi-touch, multi-channel campaign bundles for "schedule & forget it" simplicity
- Agent profile-driven local microsites and landing pages
- On-demand print management, including system to manage "promo points"

Outcomes are reviewed regularly. At the end of 2011, outcomes for the year included:

25% **Reduction in Printer Costs**

4% **Increase in Premiums Via Lead Nurturing**

15% **Reduction in Marketing Campaign Costs**

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Property & Casualty Carrier

This property and casualty company had difficulty convincing independent agents to opt-in for campaigns or reuse the company's collateral, so their primary goal was to improve brand and messaging control by making it easy for agents to fine and use the materials corporate marketing created. Other challenges included:

- Reducing customization costs
- Eliminating a reliance on inefficient print collateral
- Improving tracking and reporting capabilities
- Providing anywhere, anytime access on any connected device (including iPads and smartphones), so agents could show a presentation or share content during client meetings

A Quick Start program delivered a branded, ready-to-go solution in less than 60 days, including both email and print capabilities. Regulatory and brand compliance, complete visibility into system usage and campaign results, and the ability to control costs were key factors in the initial purchase decision.

However, the primary outcome proved to be increased loyalty from independent agents and CSR's, who appreciated the easy-to-use marketing and sales tools the company could provide through the Distribion platform. Other outcomes included:

22% **Reduction in Print and Direct Mail Costs**

18% **Reduction in Ad Hoc AdBuilder Costs**

25% **Reduction in Time Spent Creating Marketing Collateral**

Large MGA

This large, multi-line MGA faced several significant challenges and wanted to:

- Provide carrier-specific collateral
- Customizable for each GA / agent
- Advanced prospect/record ownership
- Improved channel training & communication

With multiple carriers and lines, and a widespread and aging agent base, the company needed a solution that was both powerful and easy to use. With help from Distribion in the form of training and managed services, the company was able to deploy solutions that could be used by agents and CSR's with little technology experience, or managed for the agents by a single administrator at the MGA.

- Customizable, personalized email templates with multimedia capabilities
- Multi-touch, multi-channel campaign bundles for "schedule & forget it" simplicity
- Dynamic assembly for customizable brochures, sales kits, and presentations for digital or print use by agents
- Print management for one or tens of thousands of print pieces

Approximately six months after launch, the company's outcome included:

30% Increase in Print Collateral Downloads

70% Increase in Agent Customization of Print Collateral

Improved email tracking reduced information request delays, so prospective customers were contacted more quickly.
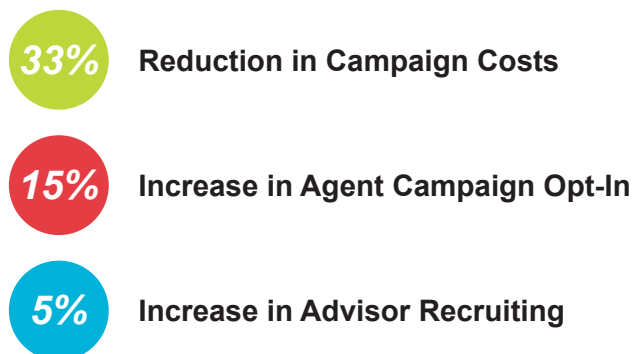
Growing BGA

This BGA already had a sales portal for its independent affiliates. However, with a large group of older, less tech-savvy agents, one of its big challenges was providing managed services that could send email campaigns on behalf of the agents. Other requirements included:

- Personalized landing pages for agents that allowed direct sales and lead conversion.
- Metrics that showed the BGA who engaged with provided content – at the agency level as well as among prospective or current customers
- Opt-in, pay-as-you-go portal for independent financial advisors with built-in tracking
- Access through pre-defined single sign-on access to campaigns from the existing portal

A Quick Start program delivered selected solutions, including implementation and managed services to adapt carrier-provided collateral for the BGA's agents, in less than six months. Solutions included:

- On-demand print management for campaigns and individual print pieces
- Customizable, personalized email templates with multimedia capabilities
- Agent profile system to automate microsite and landing page creation
- Digital asset management system for policy-related forms

Positive outcomes included:

33% Reduction in Campaign Costs

15% Increase in Agent Campaign Opt-In

5% Increase in Advisor Recruiting

Want To Sell More Policies While Building The Case For Marketing Automation? Now You Can.

For the first time ever, we'll set up the industry's leading multi-channel distributed marketing automation solution for you, free. We'll throw in four hours of training and an hour of consulting time, as well as some pre-built templates for common campaigns like 90-day product renewal campaigns.

Come and Play in Our Sandbox - Free!

You can play in our sandbox free, using off-the-shelf tools and components that let you get a sense of how the system could work for you. The sandbox environment is like an extended demo, where you can customize our proven insurance templates with your logo, and send test campaigns within pre-set limits.

Most of our clients, however, find that they want more than that, and opt instead for our Quick Start Program. It's the fastest, lowest cost way to deliver a proof of concept while you plan for a full deployment.

Picking the Quick Start Option

With the Quick Start program, we'll create a branded Distributed Marketing Platform that's customized for your team. We'll waive the set-up cost for your branded platform, and we'll make you an offer on managed services that includes an analysis of your current challenges.

- How are you handling collateral & executing campaigns today?
- What marketing and sales enablement tools are you using now?
- Who (which organization) supports marketing initiatives now?
- What can our technology and services do to deliver measurable results for you?

After the assessment, we'll move quickly to take your existing collateral (or create new materials) and turn it into optimized multi-channel campaign templates. You can begin using them right away for acquisition (book building) or cross-sell (account rounding)

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campaigns that will clearly demonstrate the value of the Distribion multi-channel distributed marketing automation solution. Also, you can add customer retention or loyalty, and win-back or channel education campaigns.

The Quick Start Program includes our managed services to help with:

- Campaign execution and monitoring
- Training for administrators and users
- Campaign analysis and KPI reporting
- Ongoing user support
- Add-on services: data, data modeling, creative, A/B testing

Quick Start programs typically last about 60 days from planning to completion, so you can have measurable results fast.

Let Us Prove Our Value!

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Facebook: www.facebook.com/Distribion

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