

One leading insurance provider's marketing automation success

Pitney Bowes' marketing automation helps one insurance provider grow its business

An international insurance company realizes greater efficiency and productivity with streamlined, automated marketing processes.



The challenge

A leading provider of insurance, employee benefits and financial services to more than 70 million customers worldwide, noticed a marked increase in requests from its agents for support that its marketing department could no longer sustain. There was a need for better lead source management and resources, as well as a process that would make it easier for agents to participate, and ultimately drive sales. Since all marketing activities had been developed and administered internally, the insurance provider decided to look outside the organization for a partner that could streamline its local agent marketing.

The solution

The company conducted a marketing industry search for a vendor which resulted in two candidates: Pitney Bowes and one of its competitors. After careful review of the proposed solutions, Pitney Bowes was selected as the insurance provider's partner of choice. No other vendor, or internal system, encompassed the depth of solutions that Pitney Bowes could provide. Pitney Bowes offered an easy-to-use, best-in-class marketing portal featuring online customization and fulfillment, backed up with friendly and efficient customer support. The insurance provider had confidence in Pitney Bowes, an industry leader with stability and proven solutions that were scalable. With the Pitney Bowes system, the insurance company could grow its marketing support according to its needs. Once the portal was launched, the company began seeing improvements in efficiencies, communications, participation, and marketing efforts right away.

The results

The international insurance provider has seen an increase in agent participation across all channels. Each agent has access to a marketing portal that's easy to use, while maintaining brand rules. Customizable media templates, extensive product information and materials, better lead distribution and reporting, a knowledge resource center, and excellent customer support have resulted in steady, increased growth. The corporate office realized greater control over brand usage at the local level, better support for agents, and advertising compliance. What's more, the company found a trusted partner in Pitney Bowes—one with a strong marketing solutions foundation—and looks forward to continuing this alliance long into the future.

Automated marketing solutions made a difference to a leading insurance provider

"It's made it easier for me to locate the information I need."

- Agency Marketing Leader

"The ready-made print ads that I can customize myself have been awesome."

- Agent

Every connection is a new opportunity™

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