



2025 DISTRIBUTION AND MARKETING CONFERENCE

Shaping Our Future

**Breaking the Benchmark
Ceiling: Strategies to Elevate
Marketing Campaigns**

Today's Presenters



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Driving Sales Through Personalization



Objectives

- ✓ Address a deficit in application volume
- ✓ Increase brand awareness



Goals

- ✓ Increased sales
- ✓ Higher email engagement



Audience

- ✓ Hyper-focused, mid-sized Distribution partner

Enhance engagement through personalization

Sender personalization

- Each email was crafted to appear as though it was sent from a specific sales contact within the recipient's territory, rather than from a generic company sender

Personalized content

- Emails included statistics and information that were specifically relevant to the recipient's business or industry

Primary CTA

- The primary CTA at the end of each email featured a headshot of the recipient's sales contact along with a button to initiate an email

Increased sales activity

- 6.9% improvement in application submissions post-launch

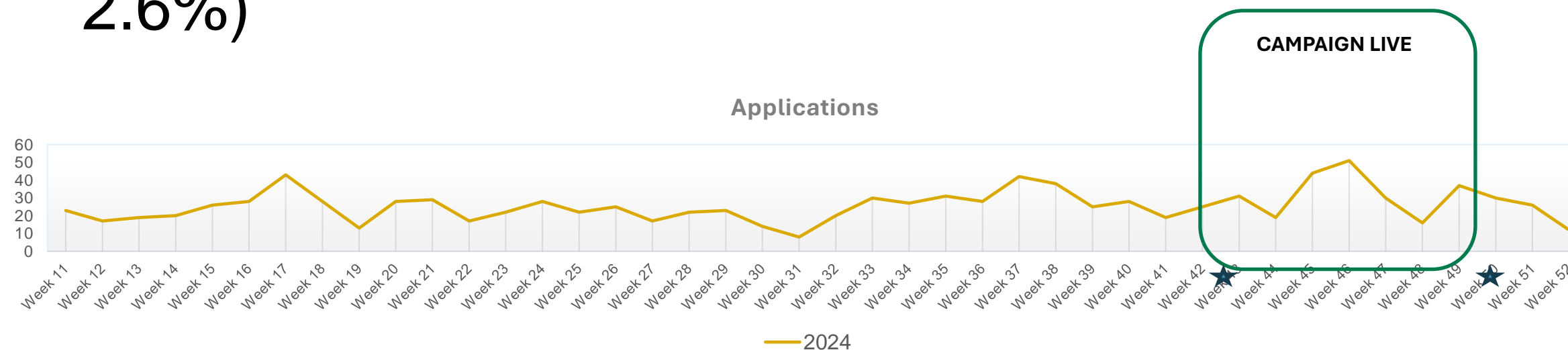
Increased engagement

- 137% higher email open rate (20.9% vs. 8.8%)
- 30.7% higher email click-through rate (3.4% vs. 2.6%)

"The emails sent out last week got a fantastic response. I received several emails, calls and a few people I reached out to mentioned the content"

"I've set up four meetings in response to the email campaign"

"A producer we've been trying to contact for months finally reached out because of our email campaign. We now have a large case coming in, and we're discussing another one as well"



What's next?

Personalize... without making it obvious!

- Use data analytics to segment your audience based on demographics, purchase behavior and engagement history
- Use predictive analytics to anticipate customer needs and deliver personalized experiences before they even realize they need them
- Conduct A/B testing on different personalization strategies to determine what resonates best with each segment

The top half of the slide features a solid blue background. In the upper right corner, there is a cluster of geometric shapes, including triangles and squares in various shades of blue, teal, orange, and yellow. Some of these shapes are arranged in a larger, more complex pattern that resembles a stylized compass rose or a map projection.

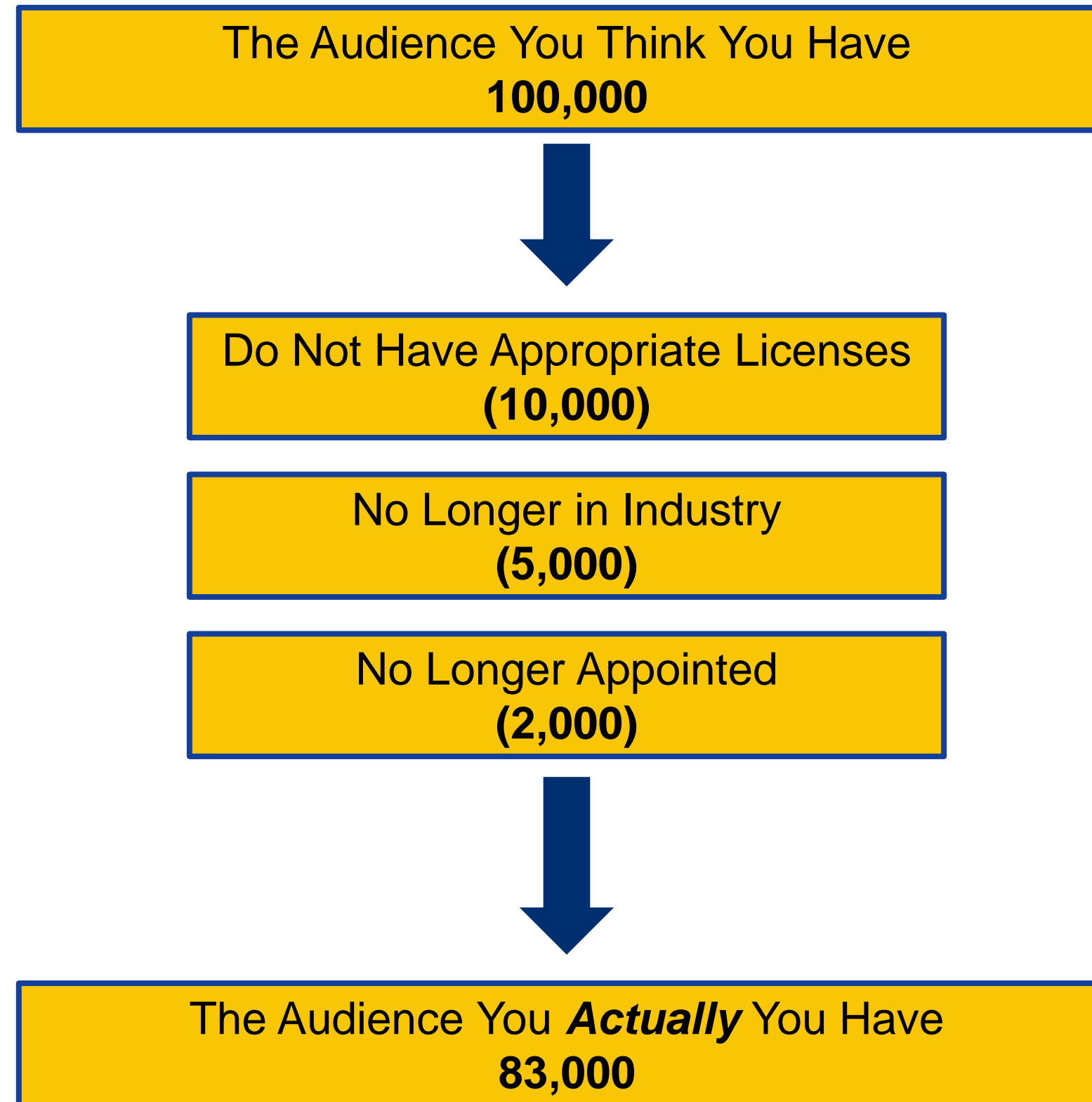
Knowing Your Audience Data

Know your audience – using data techniques

Leverage your data to drive stronger engagement

- Use data analytics to segment your audience based on demographics, purchase behavior and engagement history
- 3rd party and industry data provide an additional lens for both model training and audience selection
- Invest in audience selection up front to save time and effort later on

Know your audience – funneling down



Know your audience – results

Results generally improve with data cleansing

- Delivery rates increase which lessens spam complaints
 - First campaign to use strong data cleansing techniques: **99% *delivery rate***
- Engagement increases with messaging going to appropriate audience
 - Campaign showed higher engagement (CTR, inbound calls) for advisors with stronger data coverage
- Higher degree of certainty = more value in targeted efforts
 - Campaign showed strongest engagement and 90-day production from advisors with stronger data coverage that were targeted with high value efforts (e.g., direct mail)
 - Direct mail efforts broke even in first two months of the campaign



Meeting Customers Where They Are: The Power of Omni-Channel Marketing

Case study – results

Product launch campaign targeting prospects and current clients.

Hypothesis: An omnichannel campaign (email, direct mail, paid media) will drive more revenue than our traditional email only approach.

Results:

Prospect Campaign

- **5% increase** in new contracts
- **30% increase** in revenue generated

Client Campaign

- **6% increase** in new contracts
- **17% increase** in revenue generated

Omni-channel – leaning into the rule of 7's



Components of the marketing funnel



Awareness
Inspire and Connect

Tactic Examples

Paid Display Ads, Social Media

Consideration
Inform and Engage

Paid Social Media Ads, Paid Search

Conversion
Lead Gen and Earned Growth

Email, Direct Mail

Retention
Capture Stories and Referrals

From strategy to action – keys to a winning approach

- **Define the Strategy** – Goals, objectives and measurable outcome
- **Know your audience** – Analyze both customer and behavioral data
- **Incorporate a mix of tactics** – Target 2-3 components of the Marketing Funnel
- **Implement a testing framework** – Ensure your measurement plan aligns with and supports your intended post-campaign narrative.

Reviving direct mail

- **Make it feel exclusive** – Position as a special opportunity tailored to the client's financial strategy.
- **Create urgency** – Use deadlines (e.g., rate changes, limited availability) to drive action.
- **Clear calls to action** – Provide multiple, bolded ways to respond (call, visit, reply).
- **Test & learn** – Optimize lists, creative, and messaging when possible, while balancing campaign constraints.
- **Channel-specific messaging** – What works in email or social may not work in direct mail—tailor and test accordingly.

Key takeaways

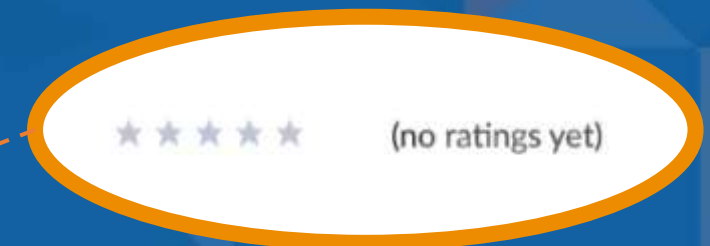
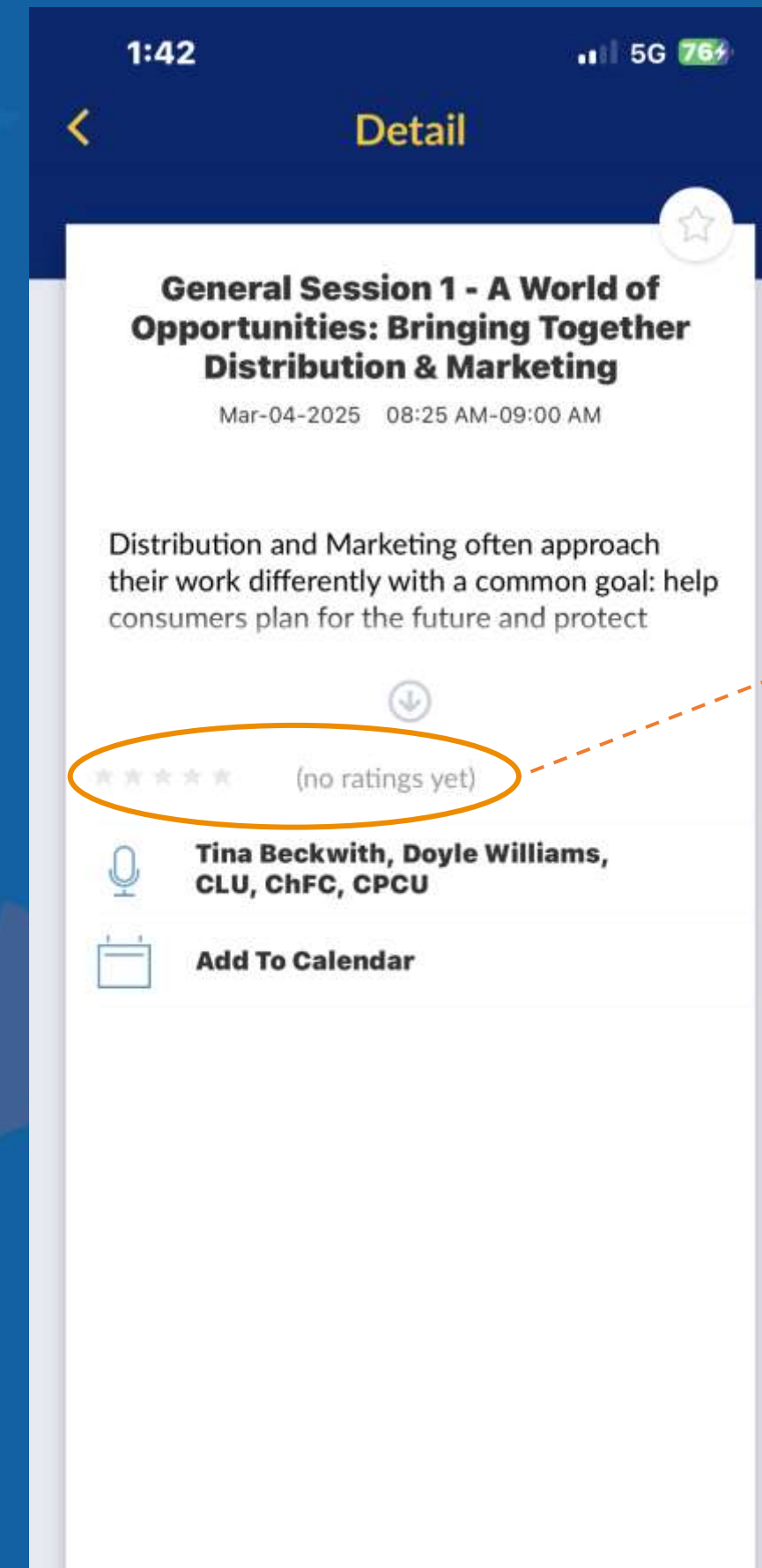
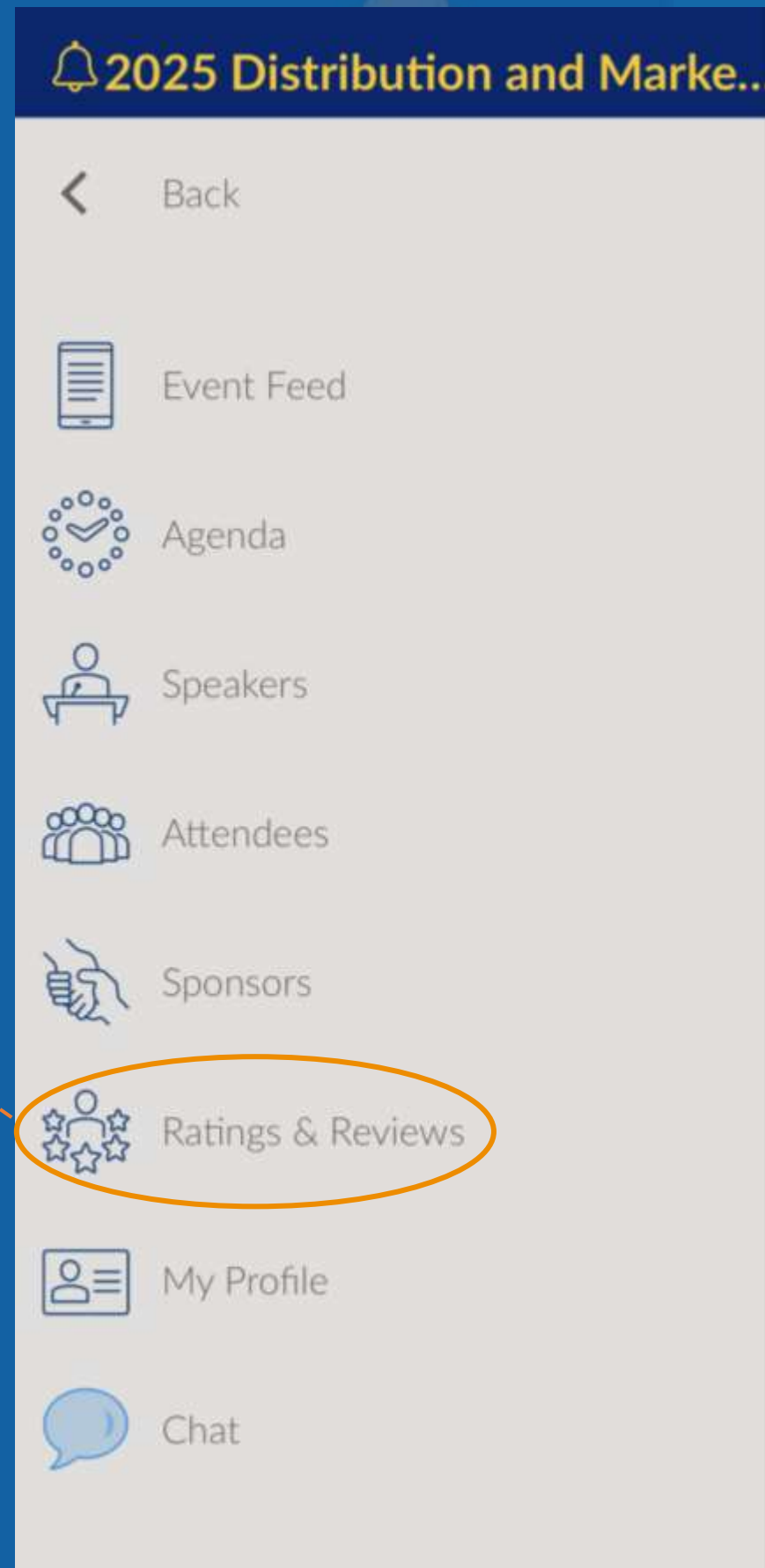
1. **Know your audience** and segment when possible – what resonates with one group likely won't with another
2. **Test and learn!** Implement a continuous feedback loop, and conduct A/B testing on different personalization strategies to determine what resonates best with each segment
3. **Quick, easy wins:** use an actual name in the “from” field to increase open rates and include a headshot of that individual in the body copy
4. **Don't be afraid to start small.** Often times the data is cleaner and easier to obtain with smaller channels, and gives you the opportunity to test without large risk
5. **Use omni-channel tactics.** Readers need to see content in multiple formats to fully digest (print isn't dead 😊).

Thank you!

“Not everything that can be counted counts, and not everything that counts can be counted.”

- *William Bruce Cameron*

Please Provide Your Feedback on the Conference App



Thank You

