

# Insurance Agency Marketing Services Increases Conversion Rates by 470% with Act-On

For nearly 30 years, Insurance Agency Marketing Services (IAMS) has served as a surrogate home office for thousands of insurance agents nationwide, providing sales and back office support, business development, case design, training academies, product information, and lead generation services, all focused on small agency growth. Each year, IAMS clients service tens of thousands of insurance policies nationwide.



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**MATT NEAL**

Director of Digital Media  
Insurance Agency Marketing Services

## Challenge

The standard email platform IAMS was using to market webinar and newsletter programs to its core audience was yielding poor results. Low response rates consistently delivered a handful of webinar registrants at best. But without a full-featured marketing solution to address deficiencies and revamp under-performing creative, boosting results had proven to be a challenge for the company.

Facing a diminishing pool of prospects and an increasingly competitive marketplace, IAMS needed to elevate its position in the market and expand its broker client base — a historically disinterested, computer-averse and unresponsive audience.

Brought in specifically to advance the company's promotional efforts and accelerate funnel building, Director of Digital Media Matt Neal quickly realized that the current marketing technology was incapable of running the campaigns the company needed to impact recruitment, drive new prospects and achieve long-term revenue objectives.

### **IAMS needed to replace its existing marketing platform with one that could address a variety of needs:**

- Marketing intelligence and lead tracking in the absence of an integrated CRM.
- Compelling, personalized email templates.
- Improved deliverability.
- Growth in web traffic.
- Higher click through rates.

**With the help of Act-On Professional Services, IAMS target lists would be cleaned to dramatically improve deliverability rates.**

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## Solution

IAMS needed a marketing automation solution that would be simple and quick to implement and would offer easily constructed, responsive email templates for substantially improved deliverability and open rates. Without an CRM system specifically dedicated to managing customer engagement, IAMS also needed a system that could provide actionable intelligence to better qualify leads and help close the loop on prospects. Already having extensive, first-hand experience with Act-On from his previous roles, Neal implemented the solution based on three key features:

### Behavioral Activity & Marketing

**Intelligence:** With Act-On, deep visibility into website activity and prospect engagement as well as email open and click through rates would help IAMS to measure response to webinar recruitment programs and identify individual broker engagement.

**Responsive Design:** With Act-On's email composer and editor, IAMS would be able to create high-quality, responsive webinar invitations that would render perfectly across any platform. Prospects would be able to view and click through these campaigns from any device.

**Deliverability:** With the help of Act-On Professional Services, IAMS target lists would be cleaned to dramatically improve deliverability rates.

### Benefit

After implementing Act-On within 3 weeks of joining the company, Neal's team has seen increased traffic to the IAMS website and a surge in new broker recruitment, much of which he attributes to the ease of creating templates and launching new programs, as well as the ability to more fully leverage campaign intelligence.

In just seven months, IAMS website traffic has grown 300%, and click through rates have tripled to 6%, surpassing insurance industry benchmarks for email marketing campaigns. Most importantly, webinar registrations have jumped by 470%, thereby opening the prospect floodgates for the IAMS sales team.

"Act-On not only helps us to execute personalized campaigns quickly and effectively, but ensures the vast majority of our communications land in functioning email boxes," says Neal. "Act-On gives us all the data intelligence we need to execute on our lead generation strategy without feeling the absence of a CRM platform."

## About Act-On Software

Act-On Software is a marketing automation company delivering innovation that empowers marketers to do the best work of their careers. Act-On is the only integrated workspace to address the needs of the customer experience, from brand awareness and demand generation, to retention and loyalty. With Act-On, marketers can drive better business outcomes and see higher customer lifetime value. The Act-On platform provides marketers with power they can actually use, without the need for a dedicated IT resource.

Connect with us to learn more

[www.Act-On.com](http://www.Act-On.com)

