

CLIENT

Insurance Company

Agents: 20,000+

ABOUT

A Fortune 200 Insurance & Financial Services firm who sell products through a network of over 20,000 agents and brokers went out to the market through an RFP in search of a new platform that would better serve their current and future Distributed Marketing needs. The ask was two-fold; to find a solution that would work across their multiple business lines; Group Benefits, Personal Lines and Small Commercial Lines. And be a more “user friendly” platform for their many end user groups in providing them with enhanced search functionality and robust reporting capabilities.

14 vendors were invited to participate in the RFP and SproutLoud was awarded the contract to become the “one-stop distributed marketing platform of record for all things local marketing related”.

CHALLENGE

The existing platform lacked highly complex template customization, very limited reporting and a less than stellar end user navigation experience with limited search functionality. As a result of limited template customization capabilities, excessive amounts of templates were needed to make sure they had all versions and variations available for customization and distribution.

The initial template audit revealed there were over 700 templates in the current platform. Poor reporting functionality on the legacy platform made it nearly impossible to understand template usage and system engagement. All reports were done manually and often took weeks to produce and provide to the Brand.

Additionally, in the existing platform, reporting at a Customer level was very difficult and Users were constantly doing double work because there was a lack of visibility into projects.

SOLUTION

SproutLoud immediately solved for the search and reporting functionality, as that is a core to the SproutLoud platform. However, during discovery, it became clear that SproutLoud’s “Dependent Selects” and “Data Driven Customization” were the key pieces of functionality the Brand was missing in order to consolidate the amount of templates actually needed.

OUTCOME

SproutLoud was able to consolidate the amount of templates down by 71%, from 700 to 200 actual templates. With the advanced customization flexibility that the SproutLoud platform provides, the 200 templates can be customized to provide over 100,000 variations for ordering. The Brand now has full visibility into the templates being used, and for who and for which accounts they are associated with. This data is available in real-time to the Brand through the SproutLoud Analytics dashboards. What previously took weeks, was reduced down to minutes. Additional benefits were “increased speed to market” on getting jobs done due to less compliance routing for customized jobs when the template customization didn’t exist prior. Jobs that could take up to 8 weeks for compliance, were now available immediately for customization and routing approvals. **That’s an 800% increase in speed to market messaging.**