

# Act-On for Insurance

Attract New Customers & Cross-Sell Existing Policyholders

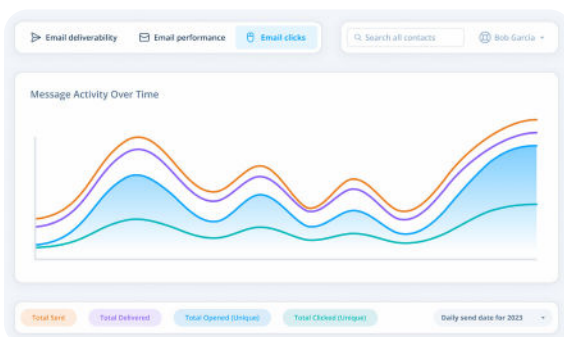
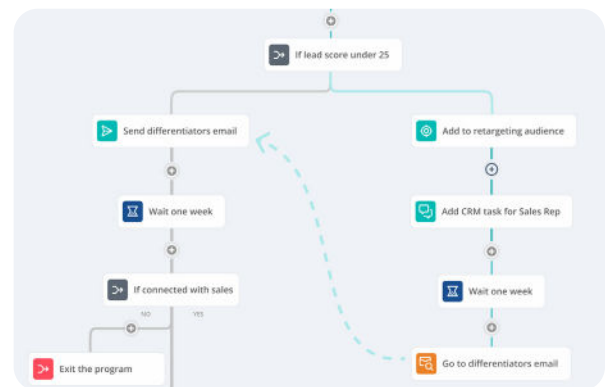
Act-On marketing automation helps insurance marketers and agents create, execute, and deliver personalized marketing efforts at scale. Leverage key insights and implement successful marketing initiatives that engage your target audience while conserving resources for sustained success.

## Promote Your Firm to Attract More Prospects

Turn web visitors into leads using the Act-On tracking beacon, and then segment them into coordinated campaigns with Website Prospector. You can also use our growth marketing automation platform to build engaging landing pages with intuitive web forms to drive conversions that trigger multi-channel nurturing campaigns.

## Automate Lead Nurturing to Deliver Exceptional Experiences

Once you've captured the lead, group these prospects into specific demographic, firmographic, and behavioral segments for more personalized and targeted messaging. This allows you to deliver messaging through automated nurture programs with sophisticated logic and dynamic content. You can also identify each users' buying behavior to create custom lead scoring programs.



## Make Data-Driven Decisions to Upsell Existing Clients

Act-On's reporting and analytics features allow you to track, gather, and analyze actionable prospect and policyholder data to better understand each clients' pain points and life events. Use this knowledge to develop and distribute campaigns and content that speak to their unique needs and interests while measuring your return on investment. Continue to collect relevant data and update and optimize your marketing initiatives for consistent improvement.

## Praise From Our Satisfied Insurance Customers

Together, our experience developing strategies and executing complex marketing automation programs for national carriers and brokers and Act-On's industry-leading marketing automation platform make an incredible offering for this industry to adapt to evolving markets and drive their business forward.

**MICHEAL TURCSANYI**  
CEO, Goose Digital



We definitely wouldn't have been able to deploy this many emails with this level of customization without the flexibility that the Act-On platform provides.

**JEN TWERSKY**  
Digital Marketing Project Manager,  
Meyer and Associates

The majority of our email campaigns are performing well on click-through rates and well above the 18-20% open rate benchmark in our industry.

**LYNN HARRIS**  
Marketing Director, RSA Insurance

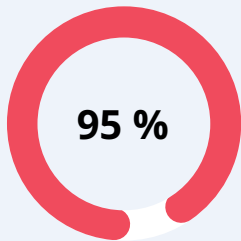


## Customer Spotlight

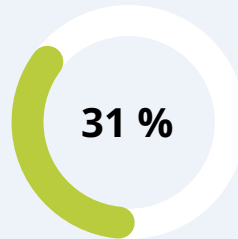
“Act-On allows us to leverage the wealth of data in our internal systems by syncing automatically with our CRM, so my lists are always up to date. Our sales reps use the Act-On dashboard in SugarCRM to follow buyer engagement and determine how to best respond.”

**KRISTIN WILLIAMS**

Marketing Program Manager,  
Physicians Insurance



**Customer  
Retention Rate**



**Email  
Open Rate**



**Time & Resource  
Conservation**

### More questions?

Call us at +1 (877) 530-1555 for help,  
or contact your success representative directly

[Contact Us](#)