



## A Personal Lines Insurance Company **Achieves 300+% ROI** by Modernizing —— Its Marketing Operations

### Objective

A large personal lines insurance company wanted to modernize its customer acquisition and retention processes, so they approached Exavalu for expert advisory services.

### Services Offered

▶▶▶▶▶ Advisory

## Challenges

The client faced significant hurdles in modernizing their customer acquisition strategy. They relied heavily on direct mail and traditional outreach methods and were struggling to utilize digital channels effectively.

Our client's over-dependence on affinity channel partners for lead generation limited diversification opportunities. Rising acquisition costs and declining retention rates further strained their profitability, highlighting the urgent need for a transformation. But due to their aging mar-tech platform, executing this vision was difficult, as it lacked the agility to support innovation.

To stay competitive, they needed a strategic roadmap that could accelerate digital transformation and drive sustainable growth.

## The Difference Exavalu Delivered

Exavalu adopted a deeply collaborative and phased approach to drive transformation. We began by leveraging our digital marketing framework and defining the key capabilities and enablers required for launching a comprehensive digital marketing program. Next, we conducted a customer acquisition funnel analysis to identify and quantify opportunity areas, ensuring a data-driven approach to customer engagement.

We outlined a detailed landscape assessment to understand the capability gaps and highlight the critical areas for improvement. Based on that, we laid out our strategic focus areas including - brand refresh, adoption of a customer-centric operating model, and technology modernization.

We finally recommended a target MarTech architecture and successfully established a structured process for MarTech platform selection and implementation.

## Business Impact

- ▶▶▶▶▶ Enabled a seamless transition to the digital-first marketing strategy.
- ▶▶▶▶▶ Facilitated a stronger direct-to-consumer engagement.
- ▶▶▶▶▶ Improved their customer journey, leading to higher efficiency and personalization.
- ▶▶▶▶▶ Enhanced customer targeting, engagement and conversion.
- ▶▶▶▶▶ Provided a future-ready architecture and high scalability with long-term technology resilience.

## Key Highlights

**300+%** ROI in 3 Years

**8X** Projected Increase in Traffic on Website

**~60%** Reduction in Spend to Revenue Ratio

**98+%** Growth in Conversion Rate within 3 Years

