Financial Services Firm Supercharges Marketing with a Unified Customer View

Company Overview

A leading insurer and financial services provider with a diversified portfolio of offerings from consumer credit to annuities that help serve families and individuals at all life stages.

Challenges + Goals

With customer data organized by product and spread across 10 databases, the company's marketing messages were limited to what was known about a customer in the context of one product. This resulted in a fragmented customer experience, with messages that didn't always reflect the customer's life stage or location.

The company wanted a single view of the customer to engage with clients more effectively, anticipate individual needs, and customize products and services by being able to model customer buying patterns across all the firm's businesses.

Winning Solution

Using the Redpoint CDP, the company was able to easily combine data from 10 distinct sources, including feeds from an enterprise data warehouse (EDW) and systems that manage individual products, customer payments, insurance claims, and external channel relationships. The solution automatically pulls data from almost 200 EDW tables daily and combines it with other customer data into a single point of control over reporting, analytics, and execution that are now in line with each customer's cadence.

Up-and-running with a single view of the customer in just 12 weeks, marketing decision-makers now have a deep understanding of customers' needs and behaviors and are using this unified view to engage customers with context and consistency.

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HIGHLIGHTS

Deployed a working solution in

12 weeks

Eliminated
3,500 lines of SAS code

Optimized
10 discrete data sources for single customer view

Automations
ensure consistent performance

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