

## > Customer Story



Industry	Business Issue	Solution	Benefits
Financial Services Focus Campaign Management	Improve speed, control, effectiveness and accuracy in marketing campaigns designed to target valuable customers, generate leads and build market share in a relentlessly competitive marketplace.	SAS® Marketing Automation	<ul style="list-style-type: none"><li>• Operational efficiency gains provided immediate ROI</li><li>• Improved campaign effectiveness will help Swinton acquire new customers, retain existing ones and drive market share.</li></ul>

## Acquire and Retain Insurance Customers

*Swinton Group uses customer data to target more effectively*

"The main focus of our marketing is to generate leads into our branch network that can be converted into insurance quotes," says Andy Mills, Head of Marketing Analysis. "To do that, we've worked successfully with an external mailing house for years. With the volumes hitting the branches growing, we decided it was the right time to ramp up our direct marketing capability in-house."

Mills says the last few years have seen the market become far more competitive and price-driven, with multiple comparison websites and aggregators appearing. "This industry and the nature of our customers have changed significantly, and SAS® will help us address a very competitive marketplace." Using SAS, Swinton has an opportunity to create and run multi-stage campaigns with minimal intervention, enabling its marketers to focus on leveraging campaign results rather than implementing campaigns in the first place.

### Smarter Marketing

Mills continues, "We wanted to be cleverer in how we used our data, and we have many more channels to consider now. In addition to direct mail we have email, SMS, telesales... we needed far more sophistication in how we segmented customers, in how quickly we could respond to the market, and to make better decisions on campaigns." Previously, the time lag between campaign data selection and results was five months. Swinton wanted to speed up the process, to bring all customer data into one place and introduce a more 'scientific element' into its marketing: historically, the business

mailed everyone with a known policy renewal date coming up, with little or no segmentation or modeling.

"In parallel with SAS, we also built a single customer view in-house based on our various product sources," Mills says. "Having that view and using SAS for customer analytics, gaining a far more granular view of customer behaviour, means far more sophistication not only in our key motor campaigns but for all other products and across all channels. We can bring a scientific approach to how we select people, how we segment the mailing, and how we integrate across channels."

### Why SAS?

Swinton ran a tendering process to identify the right solution, focusing on capabilities across campaign management and modeling; it wanted a complete solution. An initial seven providers became two and, following proof of concept, Swinton chose SAS. Mills says SAS offered all the capabilities required in a single system, from data selection onwards, while forcing people to follow a methodical step-by-step process to build campaigns.

“ SAS means we can collect far better and more transparent performance data on campaigns and channels, and use that learning to target people more effectively. ”

Andy Mills, Head of Marketing Analysis

"We're a small team and wanted to hit the ground running," he explains. "It made sense to have an integrated solution. I need to respond to business demands fast rather than saying 'Sorry, it's going to take four weeks for that data selection'. I wanted to do that in hours, while knowing it was being done right with the proper controls." In short, Swinton wanted a solution powerful and flexible enough to meet campaign design, data complexity and cross-channel requirements but one that also imposed discipline on campaign development. "For instance, SAS has re-usable templates, for data suppressions say, and a built-in sign-off so people can't just release campaigns. I also had confidence based on the SAS account team."

The elapsed time from the project starting to Swinton being fully self-sufficient was just 20 weeks, a short period of time given the huge degree of knowledge transfer involved and the fact implementation also included the single customer view and migrating data from the agency. SAS Professional Services worked alongside Swinton on the marketing automation aspects. "This was one of the smoothest projects I've ever worked on," says Mills. "Our SAS project manager shaped the project around how Swinton worked rather than trying to force theoretical principles on us. He brought the right people in at the right time, making it appear a seamless body of people. On both the IT and campaign management sides, the SAS account team added a great deal of value. We never had to re-brief the consultants coming in - you always got the impression they understood the business and what we wanted to achieve. They ensured a complete knowledge transfer."

## Improving Efficiency, Enhancing Campaigns

Using SAS, Swinton can run more timely and targeted campaigns to attract new and lapsed customers. By improving understanding of customer behaviour, SAS will help Swinton predict their likelihood to respond to specific offers, so influencing response rates. In practice, while other insurers might run 10 campaigns monthly with five cells each, Swinton runs one big motor insurance campaign each month comprising 50 cells, mailing up to one million pieces to 300,000 – 400,000 recipients with known renewal dates. "We do this in one campaign, so it's quite complex to build in terms of segmenting the data," says Mills. "This is where the logical approach provided by SAS comes in, and the ease of segmenting your data. It's simple to do and easy for others to understand."

Less than three months after go-live, "The vast majority of our direct marketing campaigns run through SAS," Mills says. "Early wins came from an operational efficiency point of view and cost savings there, with SAS enabling us to bring this activity in-house and give it a greater internal focus, rather than continue to outsource."

The insurer is now using SAS to start evaluating effectiveness across direct mail, email, the web and SMS, to understand which channels are working best and where to make improvements. This will have an impact on how budget and resources are allocated to concentrate on the channels yielding the best results. "We never had this before," says Mills. "We're developing contact histories and looking at responses, to understand the impacts of using different channels or a multi-channel approach. SAS means we can collect far better and more transparent performance data, and use that learning to target people more effectively. Until now we never had information on cross-product holdings, and cross-customer metrics. For the first time, we can explore areas like customer retention rates by number of products held, or retention rates by how soon we contact a customer in the retention process, or simply information on the types of customer holding different kinds of products. This sort of information is now being discussed at board level.

"SAS has become a buzzword at Swinton, as in 'SAS can do that' or 'Can SAS do this?' It certainly has a high profile, and is helping raise the profile of what my team can do for the business."

SAS gives Swinton Group THE POWER TO KNOW®

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