

Insurance Marketers Guide to Compliant Content



In an evolving insurance landscape, the traditional reactive model of customer engagement is being challenged by new expectations, changing notions of loyalty, and emerging InsurTech disruptors. Successful agencies are shifting to proactive approaches that seek to understand customer needs, anticipate life events, and deliver personalized experiences. To achieve this, they must address challenges related to compliance, audience targeting, and personalization at scale.

Key strategies for modern customer engagement



Understand your audience

- Centralize customer data to create a single source of truth
- Standardize customer data sets to improve usability and real-time insights
- Analyze data using AI to identify meaningful signals for segmentation and targeting



Personalization at scale

- Connect intelligence with action by integrating customer engagement tools
- Implement automated journeys tailored to specific life events (e.g., graduating college, buying a house)
- Utilize pre-built brand templates to maintain a consistent brand experience in communications



Simplified compliance

- Build a library of compliant templates for marketing materials and communications
- Employ tools for automated compliance checks against defined rules
- Streamline human-powered approval workflows with digital processes

Balancing digital tech and the human touch

On the surface, it's easy to think that scaling up digital customer journeys means removing genuine human connection from the agent-policyholder relationship. But the reality is very much the opposite. Done well, this kind of modern, tech-enabled customer engagement can create more genuine and useful personalization to the digital-first interactions that dominate our world today. Plus, the most innovative and forward-looking agencies see that they're not using tech to remove the agent from the customer experience. Rather, they're implementing purpose-built solutions that give them true customer intelligence and automation that enables them to focus their all-star agents' time and effort on proactively reaching out to provide a personal touchpoint—exactly when and where it matters most.