Safeco Insurance™
A Liberty Mutual Company

Transforming agent engagement & awareness

Safeco integrates Sitecore and Salesforce to grow revenue and reduce costs

Industry: Finance • Founded: 1923 • Employees: 8,000
Headquarters: Seattle, Washington, USA • safeco.com

Originally founded in 1923, Safeco Insurance – a Liberty Mutual company – protects families and individuals across the U.S. with a range of personal insurance policies including auto, home, motorcycle, recreational vehicle, watercraft, and more. A critical channel to market is a network of 100,000 experienced, independent insurance agents usually located within customer communities.

The Challenge

As the only channel to get to market, insurance agents are critical to Safeco. However, they are independent and free to use competitive products. So, providing high-quality, relevant information and a good experience are essential to ensuring Safeco and its products remain at the forefront of agents' minds.

"Insurance agents drive everything we do at Safeco. Marketing needs to engage with agents and show that Safeco is the best product to sell, as well as provide them with the necessary tools and information," said Ashlee Lochbaum, Marketing Technology Strategist, Safeco Insurance. "Independent agents value ease, clarity, and convenience when working with a carrier so the agent experience with Safeco is our Number 1 priority."

Safeco had invested in Salesforce to use email to improve agent segmentation and targeting. Despite having a wealth of data to enrich agent communications, it was not being used effectively, nor were other Salesforce products being sufficiently leveraged. Personalization, and scaling it to 100,000 agents, was especially lacking. Safeco relied on integration between Salesforce Marketing Cloud and Salesforce Sales Cloud for reports, campaign lists and audience segmentation. For the web,

100,000
Independent insurance agents

799
New agent enrollments
in 1st month

33%
More engagements than
best month ever

> **"** In my opinion, Sitecore, Salesforce Marketing Cloud and Salesforce Sales Cloud together are the Holy Trinity of marketing automation.
>
> — Ashlee Lochbaum, *Marketing Technology Strategist, Safeco Insurance*

there were agent portals built in SharePoint. Yet these also lacked integration with Sales Cloud so had limited personalization or targeting capability. Likewise, social media was used but only for general blasts.

The Sitecore Solution

Lochbaum and her team began a digital modernization project to reduce internal costs, improve agent experience, and grow agent revenue. "We spent months evaluating an effective CMS and digital experience platform. Sitecore easily rose to the top in terms of ability to personalize content, ability to capture site behavior, connectivity with other marketing applications, and ability to support automated processes to scale our marketing efforts," said Lochbaum.

Safeco partnered with Sitecore and Salesforce to develop a new customer experience improvement strategy comprising four key elements:

- A data lake bringing together different data sources for a 360-degree view of agents

- Leveraging Salesforce tools more effectively to increase personalization

- Implementing an enterprise-grade, public-facing website and CMS platform

- Bringing data, tools and CMS together to deliver a timely, personalized experience relevant to each agent

The cornerstone of Safeco's agent communication strategy is Sitecore® Experience Platform™ (XP) integrated with Salesforce Marketing Cloud and Salesforce Sales Cloud. This combination enables Safeco to automate transactional processes and manage campaigns, integrate and automate email and social media communication as well as analyze website activity, and use web content to personalize agent communication and experience.

Data and content synchronization between Sitecore and Salesforce allow Safeco to trigger a marketing cloud journey based upon how agents interact with Sitecore content. Modules in Salesforce like Advertising Studio can be used to develop and display targeted social content in parallel with email and web content.

The Outcome

The Sitecore and Salesforce solution has improved data integration, delivered deeper, richer audience insights and enabled much more effective cross-channel engagement. Not only is it easier to design and build automated agent journeys, those journeys are more detailed, intelligent, and engaging. Safeco can track site and omnichannel behavior to further target and personalize marketing activity. Greater insight into agents' 'digital body language' has made it easier to spot unengaged agents and reduce missed opportunities by re-engaging with agents via their preferred channel with relevant content.

Shortly after the new solution went live, agent engagement improved dramatically. For example, in the first month there were 799 new enrollments, which is 33% more than the highest monthly enrollment rate Safeco had ever seen to that point. Safeco reused existing content as part of the incentive program, and because of integration between Sitecore and Salesforce, it was able to deliver a consistent experience across multiple channels and significantly improve agent response.

To learn more visit sitecore.com

Success Snapshot

- Sitecore® Experience Platform™ (XP 8.2)

- Integrations
    - Salesforce Marketing Cloud
    - Salesforce Sales Cloud
    - Advertising Studio
    - Journey Builder
    - Email Builder