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Old Mutual's Birthday Experience Gets 3.5X the Industry Click Rate

Overview

Old Mutual's **Mass and Foundation Cluster Franchise** (MFC) is an alternative financial services distribution business within Old Mutual. To support their value proposition, and to promote registrations for **Old Mutual Rewards**, Everlytic helped them develop and build an API-triggered, hyper-personalised messaging experience. This automated journey invites clients to enter a competition during the month of their birthday to win a tailor-made pair of jeans – just like Old Mutual's tailor-made products.

The results? In some months, the click rate has been 3.5X **the 2020 industry average**! Here's how they did it...

Objectives

Old Mutual MFC wanted to surprise and delight their customers during their birthday month and drive registrations and activity on Old Mutual Rewards.

Execution

Old Mutual MFC briefed Everlytic's Managed Services team to develop and build the customer journey. The birthday experience was triggered via an API integration and the delivery was managed by Everlytic's **transactional messaging infrastructure** (though a similar journey can be built using **Everlytic's workflows** too).

This is a view of what the journey looked like:

Journey triggered by API

Condition: Does contact have an email address?

Yes →
Condition: Is the contact and Old Mutual Rewards Member?

- **Yes** → Send version of birthday email with "Log In" CTA. → Contact is directed to log into the Old Mutual Rewards website.
- **No** → Send version of birthday email with "Join Now" CTA. → Contact is directed to register as a member on the Old Mutual Rewards website.

No →
Condition: Is the contact and Old Mutual Rewards Member?

- **Yes** → Send SMS with "Log In" CTA linking to "Log In" carousel landing page. → "Log In" version of carousel landing page. → Contact is directed to log into the Old Mutual Rewards website.
- **No** → Send SMS with "Join Now" CTA linking to "Join Now" carousel landing page. → "Join Now" version of carousel landing page. → Contact is directed to register as a member on the Old Mutual Rewards website.

The campaign assets included:

Two Slightly Different Versions of An Email for Email Clients

One for Rewards members (with a CTA that says '*Log In*'), and another for clients who aren't Rewards members yet (with a CTA that says '*Join Now*').

Personalisation on the emails included:

- Subject line personalised with contact name
- Personalised image (contact name on jeans tag)
- Customised entry date based on when they received the email (three winners were picked for each month of the year)

Two Slightly Different Smart SMS Journeys for Mobile Clients

Clients were sent one of two slightly different versions of an SMS, also with different CTAs, depending on if they were Rewards members yet or not.
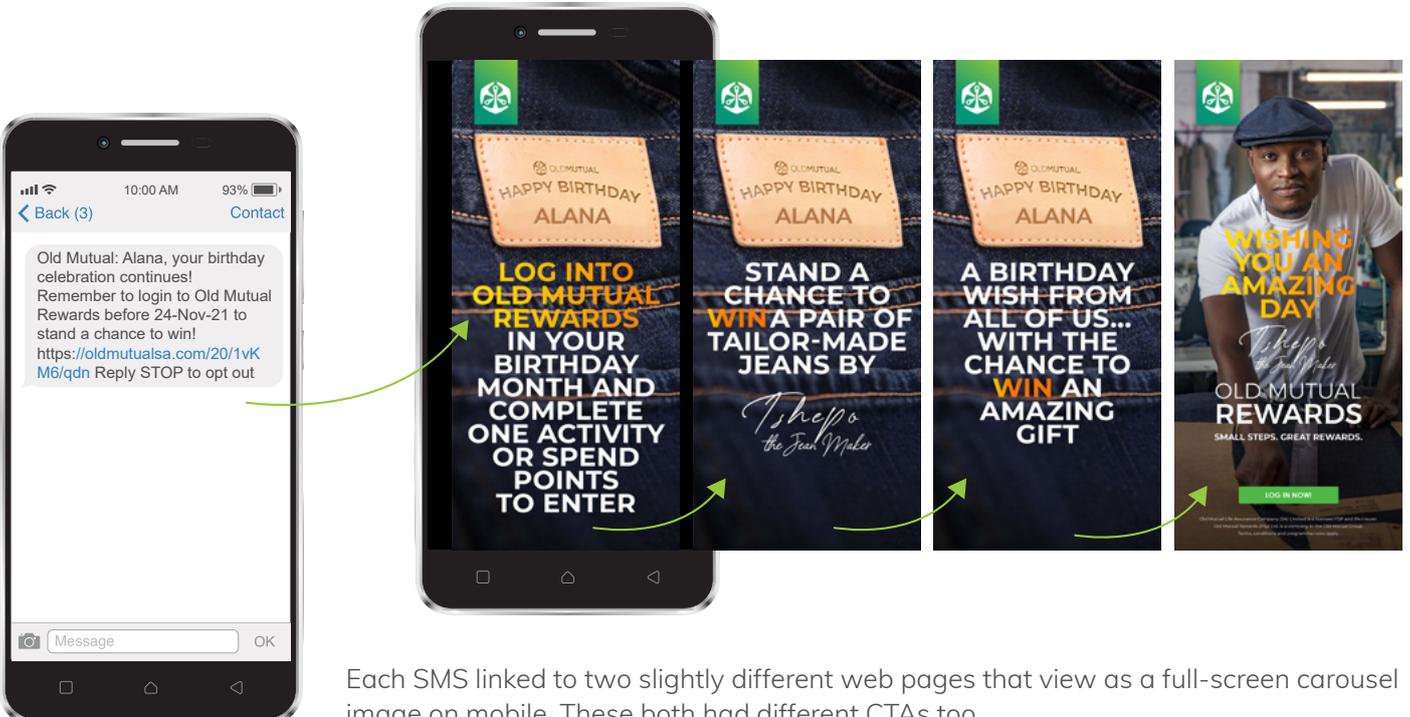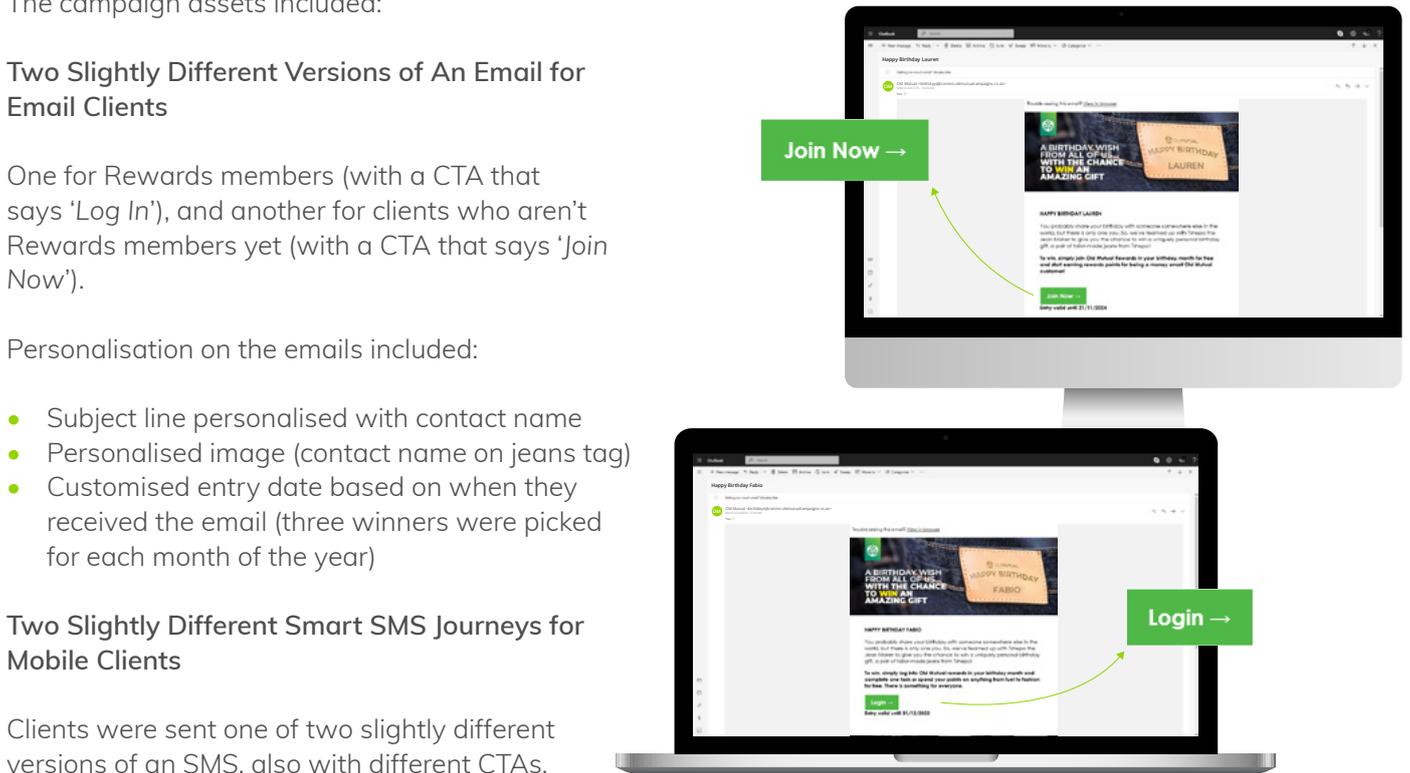

Each SMS linked to two slightly different web pages that view as a full-screen carousel image on mobile. These both had different CTAs too.

The emails and the carousel landing pages from SMS all linked to the Old Mutual Rewards page. The Everlytic reporting data is also fed into Old Mutual's internal reporting dashboard, allowing them to track how effectively the campaign is meeting their goals.

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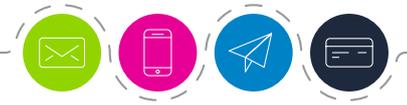
Campaign Results

This communication journey runs month on month, so the engagement stats are different every month. But in most months, the engagement is great. For instance, in some months, engagement gets as high as:

77.8%
Open rate

17.6%
Click rate

This is more than **2.5X** (roughly 267%) the average open rate in finance and almost **3.5X** (344%) the average click rate from **our 2020 benchmarks**.

Why it Was Successful

The campaign has been and continues to be successful for multiple reasons:

- **It maximises on personalisation**

  While greeting people by name in your messaging is an important **entry to personalisation**, it isn't enough to stand out in a crowded market. For that, you need to create custom experiences that are relevant to the people you're sending them to.

  Old Mutual used features like **personalisation tags and database segmentation** to create custom experiences for contacts who were / weren't members of Old Mutual Awards, as well as for recipients who did / didn't have an email address.

- **It used Smart SMS technology**

  Smart SMS functionality enables you to link to an online version of an email or a landing page via a link in an SMS. Old Mutual was able to leverage this to create an eye-catching and engaging experience even for customers who didn't have email addresses.

- **It engages people at a time that they're more likely to be engaged:**

  Birthdays and special dates are ideal times to engage with contacts. Old Mutual took the opportunity to provide value and create a fun, meaningful experience with contacts at an important time in their lives – and the results speak for themselves.

- **It leveraged Everlytic's Managed Services team**

  Some ideas are too big to execute without support from experts. In this case, Old Mutual had an idea and briefed our **Managed Services team** to create it.

  So, in addition to using Everlytic's standard personalisation and **automation tools**, they were also able to custom-personalise the image on the email, link to a carousel landing page from SMS, as well as create and publish the entire campaign without building it themselves.

- **The messages are triggered by API**

  Everlytic's **API integrations** enable businesses to automate their messaging via other systems. In Old Mutual's case, the birthday journey was triggered from their own systems via API and Everlytic's functionality automated the personalisation and delivery.

Optimise Your Client Experience

Ready to create fun and hyper-engaging customer experiences for your brand?
Get started using our **step-by-step personalisation guide**.

Alternatively, reach out for a free Everlytic demo.

Get a Demo